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Final Report

LIFELONG LEARNING PROGRAM

September 1981–1986

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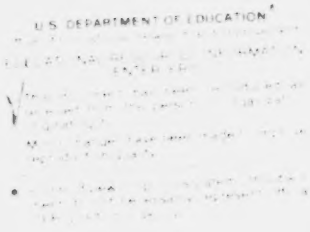

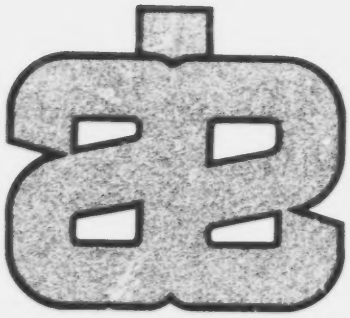

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ABSTRACT

Studies of the educational development of adults were conducted to (1) identify adults' perceptions of the personal and institutional factors that help and/or impede them in successfully completing the admissions process for entry into postsecondary education and (2) develop and validate interventions that will enhance adults' decision and commitment to return to school. The facilitating factors identified were employment-related motivators, financial asistance and improvement, institutional information and services, institutional characteristics, personal motivators, and encouragement from others. Factors found to impede reentry into postsecondary education included financial difficulties, lack of information and services, confusion and unfamiliarity with institutional proceses, apprehensions about self, the necessity of handling multiple responsibilities, and time management concerns. The following were deemed the most important in enhancing students' desire and commitment to return to postsecondary education: an orientation program and orientation course components, a staff development program, a community resources component/educational planning resource center, reading level analysis of instructional materials, and a progress monitoring system. (Appendixes to this report contain a Lifelong Learning Program resource directory and abstracts of the following three project technical reports: "Institutional Selections and Descriptions," "Vocational Development Task #1--Making the Commitment to Vocational Training," and "Educational Development Task #2--Adults Managing Learning.") (MN)

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Final Research Report
on the
Educational Development of Adults

Making the Commitment to Return to School and Managing Learning

September 1986

Walter W. Adams, Project Director

Lifelong Learning Program
Appalachia Educational Laboratory, Inc.
P.O. Box 1348
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Technical Report FY 84 - Educational Development Task #2 - Adults Managing Learning

Appendix B: Lifelong Learning Program Resource Directory

RESEARCH ABSTRACTS ON THE EDUCATIONAL DEVELOPMENT OF ADULTS

Making the Commitment to Return to School and Managing Learning

September 1986

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INTRODUCTION

Adults making the commitment to return to school and managing learning are the first two in a series of five Appalachia Educational Laboratory Lifelong Learning Program research studies of adult development. These studies are based upon a developmental stage conceptualization that covers postsecondary entry, matriculation, completion, and entry into employment. The studies reported here focus on adults during the admissions process and their initial period in school.

The educational development of adults was selected as the framework for research because although educational and vocational-technical training programs differ in terms of content, the developmental sequence adults experience as a result of education and training is regarded as more uniform and consistent. This conceptualization makes it possible to conduct research at a limited number of institutions and to develop and test interventions that will be potentially useful across a wider range of similar institutions and programs.

Adult development is defined in terms of Educational Development Tasks that describe the requirements adults must meet to be successful in entering and completing educational and vocational-technical training programs. Success for each educational development task is based upon satisfactory completion of preceding tasks and the ability to perform the higher level competencies required by the current task. The title for each task is expressed in terms of the "functions to be performed" by the learner. The sequence of tasks hypothesized for successful completion of postsecondary education and vocational-technical training is as follows: (1) making a commitment to return to school, (2) managing learning, (3) developing occupational competence, (4) planning for employment, and (5) becoming employed.

An educational development task involves the action and interaction of both personal and institutional variables. For the learner, this means integrating subject matter, including specific skills, with appropriate attitudes and values to meet the institutionally defined requirements for success in a specific educational or vocational program. Growth occurs through completing the requirements for each task and the readiness of the learner to move beyond the current task to the next one.

The following research summaries are on the first two educational development tasks.

RESEARCH SUMMARY

Adults Making the Commitment to Return to School

Appalachia Educational Laboratory's study of the educational development of adults focused on: (1) identifying adults' perceptions of the personal and institutional factors that facilitate and/or impede them in successfully completing the admissions process for entry into postsecondary education, and (2) developing and validating interventions that will enhance the facilitating factors and moderate the effect of the impeding factors affecting adults in making the commitment to return to school. This educational development task starts at the point of considering school as a vehicle for self-development and continues throughout the admissions process up to the point of registering and starting classes.

Research involved the use of qualitative research methodology and was initiated in September 1981 at two community colleges located in Kentucky and Virginia, with five additional schools in the region serving in an advisory capacity.

Basic research covered the following three phases: context analysis, problem identification, and problem specification. The context analysis involved: (1) institutional case studies to examine the roles and responsibilities of administrators, student services staff, academic advisors, and admissions and clerical staff in terms of their work with adults during admissions; (2) an in-depth look at admissions requirements and procedures and information resources with the associated information delivery systems; and (3) a sample of adults who completed and failed to complete the admissions process. Analysis of these data resulted in the preliminary identification of the facilitating and impeding factors to be examined during the problem investigation phase.

The problem investigation involved the development and validation of instruments and conducting formal interviews with adults in the fall of 1983. The sample included adults who made it though admissions and registered for classes and those who started but failed to complete the process. The analysis of these interviews resulted in identification of 101 specific facilitating factors and 93 impeding factors.

The problem specification resulted in identification of the critical factor categories and finalization of the Admissions Model that emerged from the case study work. These categories are shown in the following chart.

Relationship of Categories of Facilitating and Impeding Factors Affecting Adults Making a Commitment to Return to School

Facilitating Factor Categories	Impeding Factor Categories
Employment related motivators	
Financial assistance and improvement	Financial difficulties
Institutional information, services, and offerings	Lack of information and services
Institutional characteristics	Confusion/unfamiliarity with institutional processes
Personal motivators	Apprehensions about self
Encouragement from others	Handling multiple responsibilities
	Time management concerns

This phase involved an advisory group composed of adults, research site staff, and project advisory groups in both the analysis and interpretation of the research findings and in developing recommendations for interventions to enhance the critical facilitating factors and moderate the effect of the impeding factors affecting adults in making a commitment to return to school.

The results of this study highlight the importance of viewing: (1) commitment as the product of adults identifying, clarifying, and integrating personal values with knowledge about educational opportunities for achieving career goals; and (2) admissions as a learning process--the means for adults to transform more general interests in education and career enhancement into values and goals necessary in developing the commitment to return to school.

The remaining stages of the R & D process involved the design, development, and validation of the 15 interventions recommended during the problem specification phase. These interventions are organized in terms of the following major products. An Administrative Handbook for admissions program operations covering admissions information management, the reading level analysis of admissions documents, validation and interpretation of placement tests, and procedures for improving information delivery systems; a Staff Development Handbook for administrators, faculty, student services staff, and office personnel, an Audiovisual Information Development Guide for preparation of locally relevant information covering the application, academic advising, and registration processes for students, and an Educational Planning Course for delivery to adults prior to starting admissions.

These interventions are designed for use with administrators, student services staff, academic advisors, admissions office and clerical staff, and adults. Others address changes considered necessary to improve the quality of information and information delivery systems; admissions procedures; and the management of admissions information. The overall objective of the intervention process is to develop institutional and staff capacity to promote adult learning during the admissions process.

RESEARCH SUMMARY

Adults Managing Learning

Qualitative research methodology was used during the 1982-84 fall terms to determine the factors that facilitate and/or impede adults in managing learning. Research was conducted at two community colleges located in Kentucky and Virginia. A sample of new adult students was selected for the study based upon their concentration in first term required courses. These students were observed in classroom learning situations, interviewed, and asked to complete daily activity logs. These data, from each of the three sources, were triangulated to identify the critical facilitating and impeding factors affecting their success in managing learning. In addition, case study methodology was used to identify and develop information on administrator, student services staff, and instructor roles as they relate to new students as well as on course syllabi; reading levels of textbooks and other instructional materials; utilization of instructional resources; and testing and grading policy and procedures.

The demographic findings show that of 397 target adults who registered for classes at both research sites, 21 percent withdrew within the first several weeks and an additional 24 percent did not register for the next term. This represents a 45 percent noncompletion rate. It should also be noted that of the 55 percent survivors, some of these adults were marginal in terms of having made a commitment to return to school (task 1) as well as meeting the requirements for completing task 2 before proceeding on to task 3.

Results support the view that institutional policy and practice involving governance, curriculum, and teaching are conceptualized in very general terms and function for the most part independently from clear assumptions about learning or consistent understanding of the learning process. In fact, it would not be understating the case to say that "learning is whatever follows teaching" and that teaching appears to be an arbitrary construct ranging in emphasis from a content to a student centered learning focus. The former and predominant condition appears to impose external and artificial constraints on adults in their developing the ability to manage learning and can result, except for unusually purposeful learners, in diffusing learning goals and externalizing one's sense of responsibility. In addition, adults who have not successfully completed the prior educational development task of Making the Commitment to Return to School appear to be dealing with both tasks simultaneously and incurred greater instances of failure in completing task 2.

Representatives of both research sites and the five consortium member institutions that serve in an advisory capacity to the project participated in the interpretation of the research findings and in selecting target areas for the development of interventions.

The outcome of the Intervention Planning Meeting resulted in the selection of four factor categories as the most critical. These categories come under more direct control of the institutions and represent facilitating and impeding factor categories most amenable to change. These basic factors are:

- Personal and career goals--sense of purpose for being in school.
- School adjustment--effective study and learning skills.
- Classroom experiences--teachers, instruction, and instructional materials.
- Institutional experiences--academic advising, counseling, placement, class size, and tutoring.

The factor categories that were not selected were regarded as not as directly amenable to change. These categories include the availability of income and funds, family support, and transportation; and unique personal characteristics and problems. These factor categories were rated lower for one or both of the following reasons.

- They represent concerns such as financial aid or transportation that could be handled during the admissions process and, therefore, addressed as part of Educational Development Task 1.
- They include factors such as unemployment, personal characteristics, and family support that are not the direct responsibility of institutions and can only be addressed indirectly through special counseling and support.

Interventions were proposed for these areas during the Intervention Planning Meeting but were not rated as priority areas for the design of interventions.

Target areas for intervention design were also selected by members of the advisory group. These represent areas regarded as the most important to enhance the effect of the facilitating factors and to moderate the effect of the impeding factors in adults developing the competence to manage learning. They are as follows.

- Orientation Program/Course Components for a one, two, or three credit hour course to facilitate educational and career planning, discovery of commitment, and management of learning.
- Staff Development Program for instructional staff on general learning concepts and learning related to specific disciplines to provide a more viable intellectual climate for the examination of teaching practice.

- Community Resources Component: Educational Planning Resource Center to describe expansion of the Educational Planning Resource Center (EPRC) to include community resources and provide guidelines and procedures for developing and utilizing a community resources component of an EPRC.

- Reading Level Analysis of Instructional Materials to aid staff in the selection and/or development of instructional materials.

- Progress Monitoring System to enable staff to identify students who may be having difficulty and provide information to academic advisors and student services staff to facilitate follow-through in providing special assistance when needed.

The highest level inference that can be made based upon this research is to affirm the theoretical construct that guided investigation. This affirmation is expressed through redefining the concept of lifelong learning to account, more explicitly, for the psychosocial nature of self-direction and to recognize the potential fragileness of self-directed learning in formal educational settings, particularly when such settings tend to regard learning as a mere epiphenomenon of teaching and encourage the displacement of less developed or sophisticated learner goals by course, program, and institutional goals. The revised definition of lifelong learning resulting from this study is as follows.

Lifelong or self-directed learning involves the exercise of personal initiative in organizing and developing self to meet the accepted challenges or requirements necessary to achieve one's goals. In formal educational settings, this occurs as learners are able to integrate course goals and content with their purposes for being in school and meet the requirements for success set by the educational institution and their individual programs of study, and course instructors.

LLP RESEARCH SITES

Ashland Community College
Ashland, Kentucky 41101

Southwest Virginia Community College
Richlands, Virginia 24641

LLP CONSORTIUM GROUP

Ashland Community College
Ashland, Kentucky 41101

Hocking Technical College
Nelsonville, Ohio 45764

Parkersburg Community College
Parkersburg, West Virginia 26101

Southern West Virginia Community College
Williamson, West Virginia 25661

Southwest Virginia Community College
Richlands, Virginia 24641

Washington Technical College
Marietta, Ohio 45750

Wytheville Community College
Wytheville, Virginia 24382

I. INTRODUCTION

The Appalachia Educational Laboratory (AEL) Lifelong Learning Program (LLP) was initiated in 1981 to address the need identified in the AEL Region to improve the prospects for adults to complete postsecondary education and vocational-technical training. The basic objective of the LLP was to identify the critical facilitating and impeding factors related to adults successfully completing five sequential Educational Development Tasks (EDT) related to postsecondary education. Two research sites were selected to serve as case studies and qualitative research methodology was used to enable LLP research staff to establish contextuality for the research findings so that appropriate interventions could be designed and validated to enhance the critical facilitating and/or moderate the effect of the critical impeding factors.

This report covers the research and interventions developed for the first two EDTs: Adults Making the Commitment to Return to School and Adults Managing Learning. Work was discontinued on EDT #3, Adults Developing Occupational Competence; EDT #4, Planning For Employment; and EDT #5, Becoming Employed in 1984. This was the result of basic policy changes made by the AEL sponsor, the National Institute of Education (now the Office of Educational Research and Improvement). The policy changes that directly affected LLP are: (1) to discontinue all long term R & D throughout the regional laboratory system and (2) to establish elementary and secondary education and adult literacy as new priorities for all regional laboratory activities. As a result of these new policies, plans were made to complete LLP research then underway and to use FY 85 for the

regional and national dissemination of all completed research and interventions. At the end of FY 85 AEL elected, with NIE's approval, to use carry over funds to conduct a more intensive dissemination within the AEL four-state region.

This report will provide a summary of all of the major components of LLP activities since its inception in 1981, through the dissemination activities conducted in FY 86. Chapter II of this report presents an updated literature review on lifelong learning and the status of adult learning in postsecondary education. The literature review also presents the new concept--Educational Development Tasks--as the theoretical basis and organizing framework for LLP research and for the eventual interpretation of LLP research findings.

The history of the LLP, provided in Chapter III, gives the reader an overall perspective on the major accomplishments, problems, and decision points that influenced the direction of the project in terms of the research, intervention products, and dissemination activities.

Chapters IV and V provide summaries of the basic research for EDT #1 and #2 and their related interventions. Abstracts for several supporting documents related to this section are located in the Appendices section of this report. The reports themselves must be consulted for detailed information on major aspects of the LLP.

The dissemination activities for the LLP are described and summarized in Chapter VII. This section provides information on the impact of LLP research findings and interventions, and the organization and structure of the LLP Network established to help ensure the continuing impact of the LLP.

II. LIFELONG LEARNING PROGRAM LITERATURE REVIEW

Problem Area Defined

Many adults entering into formal education or training programs encounter problems with learning. Too few are able to adapt to the demands imposed by institutions and the teaching-learning process. Some are "side tracked" by personal problems while others have difficulty completing work to meet course requirements. In addition, many find they do not have the educational background or basic skills necessary to learn occupationally related knowledge and skills. Others lack the background and information to even know whether or not they have made a sound choice. They find that after entering a program, it is not what they expected or related to their interests. This problem is acute during the initial period of training when many drop out of programs or decide to change programs or try something else.

The development of employment and employability seeking skills is another area that is critical. Adults need to understand how the occupational skills they are developing relate to work in the field of preparation. It helps if they understand the transferability of their skills to other occupations as they seek employment and opportunities for advancement, or encounter other career changes. Too few adults, especially those within the Appalachian Region, have developed satisfactory employability skills, such as knowing how to utilize existing employment information resources, complete job application forms, or promote themselves and their potential value as an employee in the interview process.

All apparent indicators, however, suggest that: (1) there are people within the region capable of benefiting from vocational training, (2) there

are institutions providing opportunities for vocational training, and (3) there are employment opportunities for those who can successfully complete training programs. A major aspect of the overall problem is getting people into available programs under conditions more favorable for their success and providing them with the necessary assistance to help them complete training and enter employment. This constitutes a complex set of problems that must be dealt with in a systematic way--addressing the critical factors involved in order to produce the desired changes.

Analysis of the overall situation leads us to a basic concern for the educational development of the individual as the most feasible domain in which to examine these problems and conduct R & D on interventions to bring about change. Adopting an educational development focus for research represents concern for adult development perspective on the teaching-learning process, one that has not been adequately studied, in comparison to the areas of curriculum organization and content and educational methodology which have been studied in greater depth. The domain of educational development, therefore, has been selected as the avenue that is most likely to provide a systematic framework for the study of this problem and provide the necessary productive solutions. An added feature of this approach, which will enhance the value of our findings, is the fact that although all training is different in terms of content, it is not different in terms of the educational-vocational development of the individual. This makes it possible to conduct studies that involve a limited number of educational-vocational programs and to develop and test interventions that will be potentially useful across a wider range of programs being offered to adults.

Overview of Literature

The presentation on the lifelong learning involvement of rural Appalachian adults consists of several sections that identify and discuss important background information, concepts, and relevant research on adult lifelong learning. A brief overview of each section follows.

Lifelong learning: concept and state of the art. This section presents a review of the origin of the concept and the variety of meanings lifelong learning has within the context of American education. A review of the current activities and research on lifelong learning reported in the literature is included.

Need for lifelong learning in Appalachia. The need for improved learning is summarized here using the primary indicators for the standard of living and quality of life in the region. Economic and educational data are presented to establish a general frame-work for understanding the demographic dimensions of the region by comparison with comparable indicators for the country as a whole.

Role of the community college in providing lifelong learning. This review consists of a discussion of the community college as a natural link between education, community, and business; and as a logical provider of educational opportunities for adults. Specific focus is placed on the problems associated with increased access, particularly attrition; and the issues affecting adults as they make the commitment to return to school and attempt to manage the learning process.

Educational Development Task Concept

This section presents a summary of research and concepts on adult development and a reconceptualization and adaptation of current theory for the purpose of conducting research on adult learning. The concept of developmental task is revised to formulate the new concept of educational development task as the organizing construct for the Lifelong Learning Program research.

Review of the Literature

The following review presents a description of the lifelong learning concept and related state of the art. The role of the community college in promoting lifelong learning is also discussed along with a presentation of evidence of the need for lifelong learning in the Appalachian Region.

Lifelong Learning: Concept - State of the Art

Concept. Concern for education throughout one's lifetime emerged in the early 1970's as the focal point of international attention on education and its importance in social and economic development. In 1971, the United Nations Education Scientific and Cultural Organization (UNESCO) appointed a special Commission to study the status of education. In May of 1972, the Commission submitted its final report entitled Learning to Be: The World of Education Today and Tomorrow (UNESCO 1972). This report is regarded by some as the most important educational document of the century (Knowles 1975). "The Commission laid stress above all on two fundamental ideas:

lifelong education and the learning society." The report stated that:

> If learning involves all of one's life, in the same sense of both time-span and diversity, and all of society, including its social and economic as well as its educational resources then we must go even further than the necessary overhaul of "educational systems" until we reach the stage of a learning society... these are the true proportions of the challenge education will be facing in the future.

In reporting the results of its study, the Commission stated as the first principle that "every individual must be in a position to keep learning throughout his life. The idea of lifelong education is the keystone to the learning society." As a result, the Commission offered the following recommendation: "We propose lifelong education as the master concept for educational policies in the years to come for both developed and developing countries"* (UNESCO 1972).

Response to this challenge in the United States has been widespread. For example, prior to the UNESCO report, a review of the professional articles and publications in the ERIC system revealed only seven documents written between 1968-72 listed under the descriptor "lifelong learning." This number increased to approximately 45 documents for the period up to 1975, an increase apparently due to interest in lifelong learning stimulated by the UNESCO report.

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*Further clarification of the concept includes: Lifelong education is not an educational system but a principle on which the overall organization of a system is founded, and which should accordingly underlie the development of each of its component parts (pp. 181-182).

In 1975, Senator Mondale introduced into Congress the Lifelong Learning Act giving the area of concern national visability and resulting in heightened interest in lifelong learning. Following this, Higher Education Act Amendments of 1976** established lifelong learning as a national mandate directed to the learning needs of American adults. Currently, there are over 170 documents in ERIC listed under "lifelong learning." More than two-thirds of the documents are dated between 1977 and 1980. The increase in the literature available on lifelong learning is due, in part, to the influence of federal legislation in establishing lifelong learning as a national priority.

At the same time, response in the United States has been selective in addressing the range of concerns identified by the Commission. For example, the elimination of preschool, elementary, and secondary education in the American response to the lifelong education concept set forth by UNESCO represents the more restricted or less than total approach in America to lifelong learning. Of all the professional articles and documents in the ERIC system in 1980, only eight dealt with the "total" educational process. The overwhelming majority of the documents in the ERIC system address lifelong learning in terms of adults and lifelong learning in higher education, community colleges, community education, adult education, and adult career development related to work.

**Lifetime Learning Act (S-2497, HR-10965). This bill aims to extend educational opportunities to meet the changing needs of Americans throughout their lives and proposes the establishment of an office of Lifetime Learning within USOE to promote lifetime learning.

The descriptor "lifelong learning" is used in the literature in relation to numerous other descriptors. Those that are the most prominent include educational development, vocational development, career development, experiential learning, reading, and basic skills. Fields or areas in which lifelong learning is used include medicine, nursing, health, industry, religion, and environment. On the social and economic side, lifelong learning is associated with human rights, human resources development, and economic development. For example, the UNESCO report cites economic development as the foremost international trend associated with education.

> ...the changing employment market in the next two decades will require from virtually every job seeker competency in basic education, and attention to job related skills that will enable employees to adapt to shifting employment patterns and employment opportunities.

Education is expected to play an increasingly more important role in the lives of adults in the view of the Committee as they expect that "leaving and reentering the educational system will likely become more common because of new demands from jobs."

In relation to the individual, the term lifelong learning is used in conjunction with self-directed, self-planned, and self-initiated learning (Gibbons 19890, Gross 1977, Knowles 1975, and Penland 1978), as well as in more general contexts that stress individual initiative and taking personal responsibility for learning.

Organizations and projects. A review of the literature revealed several organizations which are very active in lifelong learning. They

include foundations, research organizations, and public and private agencies. Sponsors of research and other activities in the field include the Exxon Education Foundation, Sears Roebuck Foundation, W. K. Kellogg Foundation, Smith Richardson Foundation, Department of Labor, United States Department of Education, National Institute of Education, Fund for the Improvement of Postsecondary Education, College Entrance Examination Board, Educational Testing Services, Educational Commission of the States, National Advisory Council on Adult Education, and National Advisory Council on Adult and Continuing Education.

Specific organizations and agencies have emerged within the past few years having as their primary concern adult development and lifelong learning. Some of these organizations are:

- Future Directions for a Learning Society (FDLS) - Operated by the College Board for the purpose of developing and setting up adult career counseling and information centers, training professional managers and planners, advising on public policy, providing encouragement and advice to adult learners through a variety of publications, linking workers to education and developing self-assessment measures for adults (College Board Press, 1980; Peterson, 1979). FDLS has also provided national leadership in lifelong learning by conducting and sponsoring special studies and reports on adult learning.

- College Board - Office of Adult Learning Services - This agency was established in 1980 as an outgrowth of the FDLS project. It is constituted to provide four kinds of services: (1) develop, field test, and market new services for adult learners; (2) design and conduct national and regional training workshops on adult learning; (3) prepare and disseminate publications; and (4) review and monitor existing College Board Programs that have application for adult learning (The College Board, 1980).

- The National Center for Educational Brokering - This organization is a division of the National Institute for Work and Learning.

> Its purpose is to provide educational brokering services to adult learners. This includes serving as intermediaries for adults and the vast array of educational resources through information-giving, referral, counseling, assessment, and client advisory (Peterson, 1979).

Other agencies provide services directly related to the information needs for adult lifelong learning. Some of these agencies are:

- Career Information Delivery Systems (CIDS) - The National Occupational Information Coordinating Committee (NOICC) was created in 1976 to develop and implement national, state, and local occupational information systems to meet the needs of a wide variety of uses (PL 94-482). Although "lifelong learners" are not included in the legislation, they are among the intended users. Legislation requires each state to have a State Occupational Information Coordinating Committee (SOICC) before agencies within the state can qualify as CETA prime sponsors, thus, nearly all states have some level of activity in developing and providing occupational information. Over 24 SOICCs have been funded by the NOICC to initiate a CIDS, a state occupational information system, as a first step toward a coordinated national/state/local system.

- Education Information Centers (EICs) - The Education Amendments of 1976 created the EICs to "provide educational information, guidance, counseling, and referral services to all individuals in a state." The range of services provided relate to the needs established for promoting lifelong learning. An existing agency within each state, such as a higher education commission or library commission, is designated to administer this program. Every state has an EIC in some stage of planning or implementation. Many states have developed educational directories, and/or computer data bases and some have instituted educational information "hot lines" to promote easy access to educational information.

Definitions of lifelong learning. Lifelong learning as a concept and as a principle provides a new perspective for the examination and conduct of education. It draws attention to the potential for fundamental change in education by moving away from education as the product of learning to recognition of education as a continuous learning process. Many definitions

of lifelong learning have evolved within the context of the lifelong learning movement in the United States. The following are found in the current literature and express both the focus and diversity of its meaning.

> Lifelong Learning - A process of learning that continues throughout one's lifetime, depending on individual needs, interests, and learning skills (Hiemstra, 1976).
>
> Lifelong Learning is defined as self-directed growth free from the traditional schooling procedures (Gross, 1977).
>
> The term "lifelong learning" is used to signify a concept of education, encouraged and implemented to some degree through concrete public policies, which recognize and meet the needs of all individuals for learning from the time of birth to death. Lifelong learning also refers to existing and future policies that foster the education of persons, other than those 5 through 26 years old, through a system that includes our traditional educational system; other institutions, agencies, and organizations with learning resources; and self-directed learning (Hoffman, 1980).
>
> Lifelong learning is the process by which individuals continue to develop their knowledge, skills, and attitudes over their lifetime (Lifelong Learning Project, 1978).
>
> Lifeling learning - the process by which adults continue to acquire, in a conscious manner, formal or informal education throughout their lifespan, either to maintain and improve national viability or for personal development (National Advisory Council on Adult Education, 1980).
>
> Lifelong learning is a conceptual framework for conceiving, planning, implementing, and coordinating activities designed to facilitate learning by all Americans throughout their lifetimes. We believe this framework should consist, for the present, of the following seven priority goals:

1. To invent and test entirely new kinds of learning programs, involving new combinations of services and new organizational arrangements, in order to better meet identified needs of populations of learners.

2. To assist all adults--particularly those with young children--to become literate and otherwise competent to function in American society.

3. To assist all individuals--particularly school age children and youths--to become resourceful, autonomous, continuous learners in their various future roles.

4. To develop learning programs that will attract and serve people having poor educational backgrounds.

5. To involve nonschool organizations providing educational services--museums, for example--in planning learning programs.

6. To include other human services organizations--social welfare, housing, and transportation, for example--in planning and implementing learning programs.

7. To maintain high standards of educational practice in all programs; to guard against fraudulent practice (Peterson and Associates, 1979).

The basic concept of lifelong learning provides a framework for generation of a wide range of subconstructs that suggest the dimensions and potential for change in education and for infusing education and life into lifelong learning. Among those identified by experts and professionals in education, adult education, and lifelong learning are:

- increase learning options for adults;
- equal access to learning opportunities and resources;
- open access to learning opportunities;

- remove traditional barriers to learning;
- increase flexibility in time, place, methods, and resources for learning;
- loosen the traditional "lock-step" sequence of education;
- emphasize learning--how to learn throughout school;
- receive academic credit for personal experience;
- close relation between schools and employers;
- reduce compulsory schooling for youth;
- increase participation of community organizations in education;
- abolish mandatory retirement;
- increase vertical and horizontal mobility in and between learning programs and institutions;
- permit leaving school once essential skills are acquired or acquiring essential skills in other learning centers;
- enter and leave training programs at will; and
- increase attention to early childhood education.

State of the art. All research and theory development with regard to adults and lifelong learning is a recent occurrence. Knowles (1975) identifies the nature of existing theory and points out the need for a new theory for lifelong learning.

> The traditional theories of learning, both behaviorist and cognitive, only explain how to instruct, not how to facilitate lifelong learning. Lifelong education requires a new theory that takes into account physical, mental, emotional, social, spiritual, and occupational development through the life span; that explains learning as a process of inquiry and illuminates the competencies necessary to engage in the process; and that provides guidelines for performance of the new roles...required to facilitate that process.

He goes on to identify the essential components that such a theory would include. They are: (1) recognition of the fact that adults have a psychological need to be self directing; (2) that the richest resource for learning by adults is the analysis of their own experience; (3) that readiness to learn is based upon a recognized need to learn related to the requirements of a developmental task confronting them; and (4) recognition of the need for immediate application as the dominant orientation for adult learning (Knowles, 1975). Knowles is proposing that the focus of lifelong learning theory be learner centered. Research on adult lifelong learning would, therefore, require examination of adult motivation for learning. Tibbetts (1979) supports this view when he stresses that research in adult learning is generally focused on the behavior of adults rather than their value structures, even though it is their values that prompt the learning behavior--learning is a more fundamental matter of choice (Tibbetts, 1979).

Individuals engaged in the field of adult education and lifelong learning generally agree on the broad principles and general goals of lifelong learning. There is, however, less agreement when consideration is given to how those goals can or should be met (Peterson, 1979). It must be recognized that there is a wide diversity of activity currently underway aimed at "meeting the needs" of adults for learning. This is obvious in the development of educational information centers, brokering agencies, and adult education programs geared to adult learning needs, and the range of activities being conducted in the postsecondary sector under provisions of the 1976 Amendments to Higher Education Act.

Peterson (1979) in his review of Lifelong Learning in America captures the idea of the conceptual diffusion that has occurred with regard to lifelong learning.

> A precise meaning for the term lifelong learning...has not been forthcoming--which may be a reason why so many diverse organizations have appropriated it. At any rate, the past half decade has seen the rise of a sizeable movement made up of a wide range of different, often competing, institutions and programs (mainly for older and other nontraditional populations) marching under the provocative, but as yet undefined, banner of "lifelong learning."

An analysis of the literature on lifelong learning reveals two distinct streams or levels of activity; representing a broad general grouping of the projects, programs, or studies reported. These two levels are research oriented programs and action type programs.

The research oriented programs include the slower, more deliberate efforts involving research and development in adult learning. The stream includes systematic review of the literature, concept and position papers, and research on adult learning and development. Examples are work done by The College Board in conducting two majors surveys involving the career transitions of Americans and life changes of Americans as reasons for learning (Albeiter 1978, and Aslanian 1980); and the work of the National Institute of Work and Learning, under a contract with the National Institute of Education, in completing a series of studies on Worker Education and Training Policies (Charner 1980, Fraser 1980, Momeni 1980, Shore 1980, and Stewart 1980).

The second stream is by far the most prominent and visible. Moody (1978) captures the flavor of this action stream when he states "lifelong learning was defined as an expansion of opportunities without really pinning down what those opportunities should be." The rapid proliferation of activity, for example, at the higher education level has been designed in part to attract and accommodate older and more traditional students (Joint Commission on Economic Development 1980). To a very large extent lifelong learning in this stream is being defined as greater involvement in postsecondary education without regard for the basic notion inherent in the original concept of lifelong learning, self-directed, or self-planned learning (Cross 1978a). This means that the basic strategy being used by many of these institutions is to make it easier for people to finance, become involved in, and participate in courses without there being any basic overhaul or reconceptualization of the teaching-learning process. This lack of appropriate revision may partly explain the high attrition rates being reported by postsecondary institutions.

The definition of lifelong learning adopted for the AEL Lifelong Learning program includes several constructs that were regarded as essential to delineating the approach to be used in guiding research. It was defined at the start of research as:

- an individual orientation involving motivation and self-direction for continuing learning;
- a continuous learning process that is responsive to the individual's problems, needs, interests, and goals;

- the process of learning and adapting to social, economic, technological, and career change;
- the informal learning of individuals as well as their elected participation in formal opportunities for learning;
- the study of adult learning and the effect prior educational experiences have on the learning capability of adults (i.e., recognizing the importance of developing a lifelong learning orientation as part of their prior educational experiences); and
- the organizing principle of a conceptual framework for conducting research, establishing public policy, and examining and restructuring of all levels of American education.

Need for Lifelong Learning in Appalachia

"Schooling is commonly regarded as the avenue of social and economic mobility and indeed research has found a direct relationship between the number of years of schooling and lifetime earnings (Porter 1982). These issues are of critical importance, particularly in the Appalachian Region where the economic and educational profile has been less than optimistic.

Economic profile. Between 1975 and 1977, unemployment decreased in both the region and the nation. The drop in Appalachia unemployment from 8.7 to 7.2 percent in a two-year period is similar to the national trend, however, the unemployment rate remained higher than the U.S. rate (Appalachia Regional Commission 1979). Although the unemployment rate for the Appalachian Region is similar to the national figure, actual unemployment may be considerably higher. Adult members of the "withdrawing families" (Photiadis 1980) may not be counted among the unemployed if they no longer seek work. Since data regarding unemployment is gathered and reported only

for persons who are active in the labor force (Bureau of Labor Statistics 1977), large numbers of the Appalachian poor are not included in the unemployment figures. A contributing factor to unemployment in the region is the decline in coal, agriculture, steel, and other industrial opportunities within the region.

Low income is another contributing factor to the substandard economic conditions of the region. In 1970, 18 percent of Appalachian families had incomes below the poverty level. In the United States, the 1978 median family income was $17,640 (Joint Economic Committee 1980). Comparable information is not available on 1978 median family income for the region, however, data collected by the West Virginia Library Commission, July 1979, for the state shows a range of $6,693 to $16,602 of median incomes for the 55 counties. The high median figure for West Virginia counties is below the national median for a year earlier. The 1979 midpoint for median family income per county was $10,452. In 1970, statistics reported 51 percent of families within the region made less than $8,000 while the national figure for median family income in 1969 was $9,433.

With the high rate of unemployment and lower income families within the region, it can be reasonably assumed that large numbers of individuals lack the education and training necessary to increase their social and economic mobility.

Educational profile. There are two important indicators depicting the educational attainment of the people within the Appalachian Region: (1) 56 percent of all adults aged 25 years and over have not completed four years

of high school, and (2) the high percentage of high school dropouts. One Appalachian state reported (1980) county-by-county figures which varied the public school dropout rate from 10.83 percent to 59.79 percent.

The condition of education may be assessed by examining enrollment figures for various ages as compared to the total population. Five of the seven AEL member states fell behind the national average for percentage of people at every enrollment age displayed.*** In addition, enrollment in postsecondary level education falls short of the national average.

An indirect measure of the quality of education in the region is the per pupil expenditure for public elementary and secondary education. Six of the seven AEL member states spent less per pupil than the national average for the 1976-77 school year.

In a study that same year, nine of eleven Appalachian states surveyed provided the Appalachian portions of those states with less financial support than the non-Appalachian portions. The differential was as high as $357 per pupil. In terms of total current expenditures, the differential was as high as $536 per pupil. In five of the eleven states, the total expenditures were less than one-third of the national average (ARC 1979). These data indicate that expenditures for education are generally substandard, however, differences within states point out that Appalachian

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***From June 1966 through FY 86, AEL served the seven states of Alabama, Kentucky, Ohio, Pennsylvania, Tennessee, Virginia, and West Virginia.

children and adults may experience educational deprivation not visible in state figures.

In an effort to identify participation in adult education by Appalachian individuals, AEL conducted an analysis of the U. S. Office of Education, Division of Adult Learning's annual adult education performance data for FY 79. The data base consists of information reported by the 50 states on 1,743,920 adults enrolled in Adult Basic Education (ABE) programs in FY 79. Data reported by AEL's seven member states were compared with data from the 43 states outside the Region. Comparisons of instructional level data revealed that the proportions of participants who entered ABE programs with less than a ninth grade education was much greater in the region (63 percent) than outside the region (43 percent). Of those with less than ninth grade education who entered programs, less than one-third (31 percent) in the region completed them, and 38 percent drop out during the year.

Two major conclusions can be drawn from the data concerning education in the Appalachian Region: (1) there is a large pool of under-educated adults, and (2) the high drop out and lower age enrollment figures indicate that this pool will continue to exist for some time. Thus, there is and will continue to be a critical need in the region to assist individuals in continuing their education. And complicating this need is the motivational variable that "the attitude toward education in Appalachia in general is not positive" (Walkins 1982).

Summary. The large amount of unemployed and lower income families in Appalachia, coupled with the high rate of high school noncompletion, dramatizes the critical need in the region for adult participation in educational programs which will increase their economic mobility.

Community colleges represent a natural link between education, the community, and business, and they have established leadership in providing lifelong learning opportunities as one of their primary goals. They provide educational programs in response to local needs; exist in greater numbers than do other public higher education institutions; are more easily accessible to adults; and cost comparatively less. However, these colleges are experiencing high rates of attrition and large numbers of academically unprepared students, while still failing to reach many adults who could benefit from educational opportunities they provide. Adults who do return to the educational process are characteristically different from younger, more traditional students; and many experience a variety of fears related to their return.

Thus, the problem is not one of ample resources or of having a sufficient number of people in need of these resources. The problem is getting the people back into the educational process, thereby facilitating their lifelong learning.

The Role of the Community College in Providing Lifelong Learning

> ... Virtually every educational leader points to increasing emphasis on lifelong learning as the dominant impact on higher education through the 1980's... Community colleges, because their reason for existence is to serve their communities, must accept leadership in meeting this challenge (Behrendt 1981).

Community colleges serve as a natural link between the community, business, and education. Developed to meet community needs, these colleges reflect local educational priorities in terms of the programs offered. Recent emphasis on vocational training programs reflects the national concern with and desire for programs which prepare individuals for employment. Although nationally associate degrees in arts and science, or baccalaureate transfer programs, declined during the period 1978-79 from 164,659 to 157,572; associate in applied science, or vocational training programs, increased substantially during the same period from 179,265 to 245,130. This shift toward vocational training programs reflects the current educational priorities of Americans. A recent public opinion poll revealed that 77 percent of the individuals in the U. S. want more emphasis placed on vocational education. The poll revealed that this domain ranked second only to basic skills in terms of "a priority deserving attention," (U. S. Department of Education 1980). Not only a national priority, vocational training was also found to be a regional priority in Appalachia. According to preliminary data analysis from a recent study, the number one priority educational area of Appalachia high school students and their parents is courses leading to a job (Photiadis 1982). The AEL needs assessment resulted in similar findings from education and community leaders and parents in the Appalachian Region (Appalachia Educational Laboratory 1981d).

This vocational training emphasis is supported by local employers as well as individuals. Community and technical colleges contacted during the

initial activities of the AEL Lifelong Learning Program indicated that many vocational programs were designed and implemented in response to the training needs of local employers (Appalachia Educational Laboratory (1982a).

Further support of the community college's capability and intent to respond to the lifelong learning needs of adults is found in the 1980 mission statement of the American Association of Community and Junior Colleges (AACJC). The mission is "to organize national leadership in services for community development through lifelong education" (MacRoy 1980). Speaking to this mission, Edmund Gleazer, Jr., retiring president of AACJC charged community colleges "to encourage and facilitate lifelong learning with community as process and product."

Community colleges had been involved in this mission even before it became formally adopted in 1980. A 1978 survey of 173 community colleges in 37 states revealed that more than 10,000 cooperative agreements had been documented which involved more than 1.5 million persons. A cooperative agreement was defined as a link between the community college and an outside agency "for the purpose of offering the resources of community colleges to serve its members or others in the community." The survey report concluded that:

> As a measure of impact on the community, the extent of this involvement is a clear indicator that in hundreds of towns and cities throughout the nation, the community college has become the center of learning and service to the whole spectrum of the community (MacRoy 1980).

Unlike other postsecondary institutions, the mission and activities of community colleges seem to relate more directly to the needs and types of students in their surrounding cities and environment (White and Bigham

1982). For example, because Southwest Virginia Community College is located in and serves a very rural, isolated district, an extensive bus service is provided in cooperation with the local communities to transport students to the college from most of the outlying areas. In addition, because snow often makes the rural roads hazardous during the winter months, all classes are delayed until 9:30 a.m. during the winter quarter (Appalachia Educational Laboratory 1982a).

In comparison to other postsecondary institutions, community colleges and other public two-year institutions have seen the largest enrollment increases. From 1979 to 1984, enrollment in public universities increased 5.1 percent, in other public four-year institutions 9.6 percent, and in public two-year institutions 23.9 percent (National Center for Educational Statistics 1981). This higher increase in two-year institutional enrollment may partly be attributed to the increase in older student enrollment for this same time period. Enrollment for adults 25 years of age or older increased 36.8 percent; for those 25-34, enrollment increased 21.5 percent; and for younger adults ages 18-24, enrollment increased 10.7 percent (National Center for Educational Statistics 1981).

A critical factor in community college enrollment is cost. According to Nielson and Poleshook (1982):

> Access to community colleges is far more tied to cost than is the case for all other postsecondary institutions. The connection between community college admission and opportunities for ethnic minorities, women, adults, underprepared students, and the demands of the business world for "career" graduates is inseparable from the cost.

The cost to attend a public community college is in general substantially lower than the cost to attend a four-year institution. The average estimated tuition and required fee costs in 1980-82 to attend a public university was $934, to attend other public four-year institutions was $724, and to attend a two-year institution including community colleges, was $387 (National Center for Educational Statistics 1981).

Another important factor in considering access is the number of institutions in existence. There are almost twice as many two-year public postsecondary institutions as there are public universities and other four-year institutions combined. For the period 1979-80, there were 95 public universities in the U.S., 454 other four-year institutions, and 962 two-year institutions (National Center for Educational Statistics 1981). A similar difference is evident in the seven states served by AEL. Table 1 shows the number of public institutions of higher education in the AEL Region.

The importance of being able to attend a community college nearby as opposed to another institution located some distance away is highlighted by Lord's (1978) emphasis on the:

> recognition that the farther from peers and institution-based learning an adult gets, the greater the chance the adult will interrupt or discontinue the learning experiences.

Table 1

Number of Public Institutions of Higher Education in Six of the Seven States Served by AEL (1979-80)

State	Universities	Other 4-Year Institutions	2-Year Institutions
AL	2	14	20
KY	*	*	*
PA	3	20	38
TN	1	9	13
VA	3	12	24
WV	1	11	5
Total	10	66	100

(National Center for Educational Statistics 1981)

*The numbers NCES provided for Kentucky represented the entire University of Kentucky System and did not identify the actual number of institutions.

The community college offers adults institution-based learning located relatively "close to home" where the student body is primarily composed of community members many of whom are older and have had interrupted educational experiences.

Increased access to community colleges has brought with it a number of critical problems, including an influx of poorly prepared students academically and an increase in attrition rates.

> Of all postsecondary educational structures in America, the public community colleges have taken the brunt of the poorly prepared students in the 20th century. Few maintain admissions requirements; hardly any of them demand a minimum high school grade point average; less than one in five imposes an entrance test; one-third of them do not even require the high school diploma. Throughout their history most of these colleges have taken pride in their open door stance... The success of the community college in expanding <u>opportunity</u> for people who might otherwise be excluded from postsecondary studies has been notable. However, community

> college success in educating all students is variable. Attrition levels in most community college programs are high. Well over one-half the students who declare their intent to transfer to senior institutions either do not complete their community college studies or complete them and fail to transfer... Similarly many students in the nonselective occupational programs drop out prior to concluding their training (Cohen and Brawer 1981).

According to the May 1976 Research Currents, attrition is "emerging as one of the most critical issues in higher education today" (American College Testing Program 1978). Community colleges see attrition as a priority problem particularly since it conflicts with the three major goals of a community college:

1. the attainment of equal educational opportunity,
2. the attainment of universal higher education, and
3. the attainment of the highest quality of community college education possible (Kester 1980).

Similar to this national concern, AEL Lifelong Learning staff found, through their initial contacts with community and technical colleges, that attrition was a concern of high priority in the Appalachian Region. A consortium composed of administrative representatives from six community/technical colleges located in the Appalachian states of Kentucky, Ohio, Virginia, and West Virginia met in Charleston, West Virginia, in May 1982. The purpose of this consortium was to identify common areas of concern with regard to adult learners, as well as to discuss possible interventions to facilitate adults in returning to school. One of the outcomes of this meeting was consensus on the high priority afforded to getting adults back to school and to retaining them (see AEL 1981b, Appendix B).

By nature and stated mission, the community college represents a viable institution for providing adults with opportunities for vocational

training. Serving the needs of the community, these colleges strive to provide a variety of vocational training programs which will prepare students for employment in their region. Americans have voiced their desire for such vocational training; however, countless numbers are not taking advantage of the training opportunities available and many who do begin training drop out prior to completion. Although, as MacRoy (1980) indicates, the community college is "a natural link in the articulation of the shared concerns and mutual goals of this nation's business/labor/government/education continuum...," there are factors operating which are pre-empting many adults from taking full advantage of the educational opportunities available. As long as large numbers of individuals are failing to complete educational programs, the aforementioned shared goals cannot be met.

An examination of why adults fail to complete educational programs must begin with a look at the motivations and characteristics which bring adults to the educational process.

Characteristics of adult learners. Cross and Zussman (1977) identified six factors that motivate adults to continue their education.

1. The desire to achieve practical personal goals, such as getting a new job, advancing in a current job, or improving income.
2. The desire to achieve personal satisfaction and other inner-directed personal goals, such as personal development and family well-being.
3. The desire to gain new knowledge, including the desire to learn for its own sake.
4. The desire to achieve formal educational goals (degrees, certificates, etc.).
5. The desire to socialize with others and/or escape from everyday routine.
6. The desire to achieve societal goals.

Looking at motivation for continuing education from a different perspective, Houle (1961) found adults could be categorized into three types:

1. The goal-oriented learners who use education for accomplishing fairly clear-cut objectives.

2. The activity-oriented learners who take part because they find in the circumstances of the learning a meaning that has no necessary connection and often no connection at all--with the content or the announced purpose of the learning activity.

3. The learning-oriented adults who seek knowledge for its own sake.

In his work, Miller (1972) found Houle's third category, adult's seeking knowledge for knowledge's sake, to be a comparably weaker motivation for adults continuing education; while Flaherty's (1978) research supports the generally accepted theory that adult learners are goal oriented. Flaherty goes on to point out that because of their goal-oriented posture, adult learners:

> have no time to waste. They generally want to learn the knowledge and skills they need to reach their goals, and have little interest in relearning what they already know or in spending valuable class time in irrelevant activities.

This brings up a perplexing problem in relation to adults' learning needs; that is, getting adults to see:

> programs as directly related to their needs. On the one hand, if a program is not recognized as being helpful in meeting the adults' needs, there will be little participation. On the other hand, addressing the program only to those needs recognized at the moment may make it shallow or superficial, since adults frequently must be assisted to recognize their real needs.

If adults fail to see the relevance of the program to their needs, they may react by not enrolling in or by dropping out of the program.

In order to identify some of the motivations of Appalachian adults for returning to the educational process, AEL Lifelong Learning staff analyzed results of a New Student Survey Form sent to all new students as part of the admissions materials from Southwest Virginia Community College (SVCC). Of the 66 adults responding to the survey, 45 percent indicated their purpose for attending SVCC was to prepare for a job, and 33 percent indicated their reason was to prepare for a job better than their current one. Only 11 percent expressed plans to transfer to another college after completing work at SVCC.

Results were similar from a survey sent to adults who were admitted to Ashland Community College (Ashland, Kentucky), but who failed to attend.

Regarding the reason these adults had planned to attend the community college, the most common purpose indicated was job improvement (54 percent), followed by self-improvement (29 percent). Only ten percent indicated a desire to take courses for transferring to a four-year college, and 12 percent indicated a desire to obtain an applied science degree. The results for this group imply that many adults are not returning to school to obtain a degree. The majority indicate self and job improvement as the purpose for returning. Thus, attrition rates based on program noncompletion may be spuriously high, since some "noncompleters" may have achieved their educational goals without completing a degree program.

In addition to motivations for learning, there are a number of unique characteristics that the adult learner brings to the learning situation which are not exhibited by younger, traditional students. The following list provided by the National Association for Public School Adult Education (NAPSAE 1967) summarizes similar lists developed by a number of sources.

- Adult learners are likely to be more rigid in their thinking.
- They usually require a longer time to perform learning tasks.
- Adults have needs that are more concrete and immediate than those of children.
- They require more and better light for study tasks.
- Older adults have restricted powers of adjustment to external temperature changes and to distractions.
- They have greater difficulty in remembering isolated facts.
- They suffer more from being deprived of success than do young learners, and they are motivated more by the usefulness of the material to be learned.
- They are less willing to adopt new ways, or even to try new ways of doing things than are young learners, but they are less distracted by social interests and tend to be steadier in the pursuit of learning tasks.
- They have more compelling responsibilities competing with education for their time, and since they are typically evening "after work" students, they are more likely to be less alert when they come to class.
- They have more experience in living, and this gives them the advantage of being more readily able to relate new facts to experience.
- Returning to school has been a momentous voluntary decision for them, and their attendance often represents a considerable sacrifice.
- Adults are more realistic.
- Adults do not comprise a captive audience.
- Adults enjoy having their talents and information utilized in a teaching situation.
- Adult groups are likely to be more heterogeneous than youth groups.
- Adults often attend classes with a mixed set of motives--educational, social, recreational--and, sometimes out of an overdeveloped puritanical sense of duty.
- Adults are sometimes fatigued when they attend class.

If educators fail to recognize these unique characteristics and to make appropriate modifications in the teaching process, the result may well be learner frustration, failure, disenchantment, and ultimately dropping out prior to program completion.

Since community colleges have been experiencing an influx of academically unprepared students, the characteristics of this special population are also of extreme importance in light of the high attrition rates these institutions are experiencing. NAPSE (1967) lists characteristics of adults who are in need of basic education. This comprehensive list summarizes those presented elsewhere in the literature.

- lack of self confidence;
- fear of school;
- living in a condition of poverty;
- probably below average in scholastic aptitude;
- culturally deprived;
- values, attitudes, and goals differing from upper and middle class norms;
- weak motivation;
- unusually sensitive to nonverbal forms of communication;
- feeling of helplessness;
- varying levels of intelligence;
- "live for today" philosophy;
- hostility toward authority;
- unacceptable behavior;
- reticence;
- use of defense mechanisms;

- need for status; and
- tendency to lose interest.

Based on a comprehensive analysis of numerous learner needs studies, Cross and Zusman (1977) were able to summarize adult learner needs into four basic categories:

1. administrative accommodations: needs for alternative schedules;
2. administrative accommodations: access to learning locations;
3. teaching/learning considerations: need for appropriate learning methods; and
4. teaching/learning considerations: motives for learning.

Probably the first time the institution interacts with this complex pool of adult learner characteristics is during the admissions process, from recruitment through registration.

Adults and the admissions process. This is a critical phase of interaction since it occurs when the adult is still formulating a commitment to return to the educational process. According to an in-depth review of the literature and a consortium-level sharing of common experience, the California Community College Research Consortium concluded that "heavy and early attrition was among the most detrimental to both the individual and the institution" (Kester 1980). It is this critical problem of early attrition which will be focused upon in the remainder of this section.

In an attempt to identify factors affecting early attrition in community colleges in the Appalachian Region, AEL Lifelong Learning staff developed a survey which was mailed to all students who had been accepted for admission to Ashland Community College, Ashland, Kentucky, for the fall 1981 or spring 1982 semesters, and then failed to attend. Preliminary

results revealed that of the 72 initial respondents, 18 were currently enrolled in a high school, college, or vocational school. Of the remaining individuals, 72 percent were over the age of 20. Seventy-seven percent of the respondents indicated they planned to return to school at a later date, and many indicated they planned to return this year (45 percent).

A variety of reasons were given for why adults were not able to attend Ashland Community College after being accepted for admission. The most common responses were financial problems (44 percent), family responsibilities (23 percent), and work conflicts (19 percent).

Adults were also asked to state their concerns/fears about returning to school. The most common concerns/fears adults cited were whether they had the ability to do the school work/to compete with younger students (42 percent); whether they could handle school, family, and work responsibilities; and whether they could afford to attend (12 percent).

Similar trends were found in responses to a New Student Survey sent by Southwest Virginia Community College (located in Richlands, Virginia) to all prospective students as part of their admissions materials. Of the 231 surveys received from fall 1981 and spring 1982 prospective students, 29 percent of the respondents were over age 20. The responses from these 66 adults were examined in terms of their "feelings" about returning to school. Forty-four percent of the adults indicated at least one concern/fear about returning, with many adults indicating several. The most common concerns were test taking (21 percent), fear of failure (18 percent), being scared (18 percent), and feeling out of place (17 percent).

Common concerns about entering college were also similar to those expressed by Ashland respondents. The most common concerns were not having a strong academic background (25 percent); conflicts with family responsibilities (23 percent); not liking to "speak up" in class (20 percent); and not having enough time to read all assignments (18 percent).

These preliminary findings indicate that many adults who are considering a return to education are doing so with substantial concerns. A significant number who do apply for admission never make it to registration. Thus, efforts to increase retention rates, particularly of the adult student, must include focus on the earliest contacts between the institution and the individual.

Tang (1981) points out that retention begins with quality recruitment. Students must be recruited ethically, oriented honestly, informed continuously, and advised developmentally. Other sources also emphasize the importance of adequate information being provided to prospective students.

Lenning and Cooper (1978) state that information provided by postsecondary institutions to prospective students is "often incomplete, insufficiently detailed, not clearly presented, or presented at the wrong time." The consequences of inadequate information include improper choice of programs, dissatisfaction, and attrition.

In the Higher Education Amendments of 1976, Congress mandated the minimal standards of information that postsecondary institutions receiving Title IV funds must provide to prospective students. Information that higher education institutions are providing to such students, however, is generally "inadequate" (Lenning and Cooper 1978). Among their numerous

examples of this inadequacy, Lenning and Cooper include a College Entrance Exam Board survey showing that over 50 percent of the prospective students surveyed might have selected a different institution if more complete cost and financial aid information had been provided. The authors also cite a Commission on Nontraditional Study report indicating that "lack of information was a primary reason why prospective adult students chose not to enroll in postsecondary institutions."

In talking with adult students in the Appalachian Region who were enrolling in educational or vocational training programs for the first time, the AEL Lifelong Learning Program staff found a generalized "fear of the unknown." Most adults lacked information concerning: (a) what was expected of them, (b) the process of being admitted and registered, and (c) what "lay ahead of them" (Appalachia Educational Laboratory 1982a).

In regard to the kind of information prospective students want, research by the National Center for Higher Education Management (NCHEM) Systems found they want information about:

- instructional programs, including class sizes and faculty experience, teaching techniques, and grading policies.
- costs and financial aid,
- impact of the institution and its graduates,
- admission and transfer criteria,
- housing and student services,
- out-of-state activities,
- student accounts of campus life,
- degree of student participation in decision-making,
- institutional expenditures,

- evidence of institutional solvency, and
- institutional goals.

The NCHEM researchers found that older students need more detailed information than do others, particularly as it relates to majors and programs.

Further, adult students struggling with inadequate information find little help in the way of support services. Since many adults attend evening classes, some of which are offered in "borrowed" off-campus facilities, provision of counseling and guidance services would require additional resources. And the current economic climate, in which pressures are being placed on increasing enrollment figures, "discourages the development of adequate adult guidance and counseling services" (Darkenwald 1980).

In addition to confronting inadequate information and little, if any, support services; prospective adult students may soon face selective admissions policies as well. With the high attrition rates community colleges are experiencing, some are falling back to the use of selective admissions criteria. The rationale behind this practice is that "it is easier to screen students out en bloc than it is to establish the criteria for functional literacy course by course" (Cohen and Brower 1981). Such a shift in policy is in direct opposition to the mission of the community college.

Many adults seeking admission to community colleges will find themselves funnelled into developmental programs. Beginning in the 70's, many institutions began dealing with the influx of poor academically prepared students by generating developmental programs (White and Bigham 1982).

Based on community college contacts in the Appalachian Region, AEL Lifelong Learning staff found several significant problems emerging with respect to developmental programs/courses:

- In "open admissions" institutions, participation in developmental programs could only be recommended, not required.
- Screening criteria for developmental programs were varied and arbitrary.
- Monitoring of student progress in developmental programs was, generally, nonsystematic (Appalachia Educational Laboratory 1982a).

Initial experiences such as those just described do little to foster retention of adult students. Lack of adequate information; few, if any support services; imposition of selective admissions criteria; and arbitrary screening criteria for and nonsystematically operated developmental programs only exacerbate the existing fears and apprehensions of returning adult students.

Academic advisement. Perhaps the most important service adult students receive once they have been admitted to the institution is academic advising.

> Sound academic advisement gives students the best information possible upon which to make wise educational decisions. It would seem quite obvious that students who make good educational choices will then have a greater personal commitment to those choices and hence are retained to a higher degree (Tang 1981).

This perspective on the relationship between sound academic advisement and retention targets for study the whole area of academic advisement when focusing on the problem of attrition. Besides the issue of attrition, The American College Testing Program (1978) attributes the recent renewed interest in academic advising to:

- changing admission and enrollment patterns,
- greater student choice of curriculum,
- accountability and consumerism issues,
- increase in the "atypical student," and
- relation of academic preparation to the world of work.

As described earlier in this paper, these trends are particularly evident in community colleges.

The American College Testing Program (1978) defines academic advising as:

> Academic advising assists students to realize the maximum educational benefits available to them by helping them to better understand themselves and to learn to use the resources of an educational institution to meet their special educational needs and aspirations.

In pinpointing the desired outcomes of an academic advising program, AEL identified the following:

- successful attainment of students' educational/career goals,
- students would achieve GPAs consistent with their abilities,
- increased retention, and
- student satisfaction with advisor and institution.

Results of a National Survey of Academic Advising (ACT 1979), which included community colleges revealed critical deficiencies in the advisement process as it is now implemented. Their conclusions were:

1. There are more similarities than differences in the approaches institutions take in the delivery of academic advising services. In general, institutions are traditional in their reliance on faculty to dispense information through the academic advising "process."

2. Generally, academic advising has been and still is perceived by administrators as a low-status function.

3. Those responsible for the delivery of academic advising services see it as an event addressing the information needs of students rather than an integral part of the students' total development, interacting with career and life planning. This is reflected not only in the manner in which the service is delivered but also in the materials used and the training provided to those who deliver the service.

4. There are few effective systems in place for the evaluation of academic advising and little reward or recognition attached to its successful delivery.

5. Generally, institutions have no comprehensive statement of policy regarding the delivery of academic advising. This may be indicative of a lack of a clear sense of institutional mission in delivering this service.

6. All of postsecondary education is communicating an increased interest in the academic advising function. This has not yet been translated into practice to any great extent. However, a new and still very small population of "professional advisors" is emerging.

In a different report, ACT (1978) summarized common failures to academic advising systems:

- lack of commitment to importance of advising,
- lack of recognition for good advising,
- inadequate training and support materials for advisors,
- lack of information about advisees,
- lack of clarity in defining role of advisor, and
- inadequate delivery system.

In addition to the deficiencies just cited, adult students have the added disadvantage of, in many cases, having limited access to advisement services. The AEL Lifelong Learning Program staff found, in its initial contacts with community colleges in Appalachia, that many adults are on campus only in the evening after most faculty have left. Adults arrive in time for class and leave immediately after, leaving no time for academic

advising. As one area community college counselor stated, "The adults are the forgotten student." Those adults who do participate in academic advisement are likely to find themselves in a process still geared almost exclusively toward the traditional, younger students (Appalachia Educational Laboratory 1982c).

If adult students successfully complete the admissions process, they then face another critical phase of returning to the educational system: adjusting to and managing the learning situation.

Adjusting to and managing the learning situation. The fear adults experience in returning to the educational process is widely recognized (National Association for Public School Education 1967, Knowles 1977, Knox 1976, and Eisdorfer 1972). Focusing on adults' fear of failure, Eisdorfer (1972) states that:

> as individuals age, they increasingly expect and fear loss and failure. The benefits of success are less important than the impact of failure. Thus, the older person, motivated primarily by fear of failure, may withdraw psychologically from a competitive situation.

Knox (1976) particularly points to the "initial encounter with a learning episode" as having a major impact on success and persistence.

In their initial work with community colleges in Appalachia, AEL Lifelong Learning Program staff found a pronounced, generalized fear felt by returning adult learners. Adults expressed fear of competing with younger, "smarter" students; fear of not fitting in or being accepted; fear of not having the academic preparation to perform satisfactorily; fear of not being able to handle school as well as work and family responsibility; and fear of unknown expectations (Appalachia Educational Laboratory 1982b).

The importance of the satisfactory initial learning encounter becomes even more critical in light of these fears and the recognition that many adults come to the learning situation with less than adequate academic preparation. One apparent solution has been to place such adults in developmental programs. However, this solution is not necessarily a satisfactory one. Morrison and Feronte (1973) cite a tendency toward immediate gratification for those adults from the lower classes.

> To them, if school is to be used as an avenue of advancement in any realm, it is toward higher status employment. Yet their tendencies toward immediate gratification make it difficult for members of these groups to accept the regiment of years of study needed before one obtains certification.

This issue relates to the adults' need, discussed earlier, to perceive course content as directly relevant to their situation. Thus, a paradox seems to exist in that (a) many adults return to the educational process inadequately prepared academically; (b) research has shown one of the best predictors of retention is grades (Tang 1981); (c) developmental programs have been generated to assist individuals in their ability to achieve; however, (d) few adults return to education for developmental purposes; and (e) without seeing content that is personally relevant to their goals, many adults will choose to enter programs without the academic skills necessary for successful completion and will, in all probability, experience the failure they fear. Or, many of those who go along with being placed in a developmental program may fail to see its relevance and after a short time drop out of the program.

And the problem reaches beyond the cognitive domain. Bligh (1977), Miller (1972), and Entwhistle (1974) emphasize the importance of social

factors affecting adult retention. These factors include: social isolation, inadequacy or remoteness of teaching staff, difficulty in budgeting time between work and social interests, and financial problems. Such impeding factors cannot be alleviated solely by developmental programs. The need for support services is clearly indicated, and as reported earlier, such services for adults are generally lacking.

Interventions to facilitate adult admission and retention into the educational process must go beyond the bounds of providing additional programs and services. As Knowles (1977) stresses, the organization of curriculum and the very design of learning experiences must be refocused from youth education to adult learning.

Summary. For community colleges which, along with other two-year public, postsecondary institutions, experience the highest attrition rates (White and Bigham 1982) and also experience the greatest influx of older and academically unprepared students; the problem of identifying factors which facilitate retention is of paramount importance. If community colleges are to fulfill their mission of providing "leadership in services for community development through lifelong education" (MacRoy 1980), they must seek ways to resolve this problem. As Nielson and Polishook (1982) warn "we will pay a severe price in the future for every retrenchment of the educational opportunity for our citizens."

Educational Development Task Concept

The advent of lifelong learning as a national priority in the mid 1970's* brought with it the need to reconsider developmental theory,

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*Congress passed this Lifelong Learning Act October 1976 thereby recognizing lifelong learning as a national priority.

particularly with regard to new concerns and issues related to the education and learning of adults. This section of the report will present a review of relevant literature on developmental theory and the reconceptualization and adaptation of the theory used to conduct the Lifelong Learning Program research.

Robert Havighurst from 1948-1953 synthesized the work of psychoanalytical theorists, such as Erikson and Buehler, to formulate applications of developmental theory to education and child development (Havighurst 1948, 1952, 1953). This involved Erikson's initial work Childhood and Society (1950) which set forth the concept of "psychosocial" development in terms of eight stages of human development; and Buehler's study of adult life histories (Horrocks 1976), in which she identified five major life tendancies that dominate or characterize different periods of the life cycle. Both of these formulations are among the first formal developmental life stage conceptualizations.

Other applications of developmental theory to adult development have been made in terms of cognitive development by Arlin (1975), Boughton (1978), Bassacher (1980), and Kitchner and King (1981) based upon Piaget's work with children; while Levenger (1970) and Weathersby (1981) addressed the area of adult ego development. The domain of adult vocational and professional development has been examined by Super (1957, 1980) and Blocker and Raposa (1981). Kohlberg (1972) and Gilligan (1981) have formulated theory with regard to moral development and Perry (1970) has made important contributions at the college level on intellectual and ethical development. Also Chickering (1969) describes the major dimensions of development during the college years for young adults while Adams has addressed the concept of vocational and career development in adult education (1975) and at the postsecondary levels (1980).

All of these formulations focus on growth in terms of stages and substages of development. They also focus more specifically on the identification of developmental patterns and the characteristics of age-related groups of people within our culture.

Zaccaria (1965) synthesized the developmental tasks identified by Erikson (1959), Havighurst (1953), and Super (1963) to arrive at 15 statements that describe the fundamental similarities among the tasks specified in their respective approaches. The generic nature of these task formulations become evident by examining the following three statements taken from the list:

1. Most individuals in a given culture pass through similar developmental stages.
2. The society makes certain demands upon individuals.
3. These demands are relatively uniform for all members of the society.

These tasks are described by Zaccarria as "nomoethetic" in as much as they are regarded, at least within our culture, as "universal." Zaccarria goes on to recognize the "ideographic" dimensions of development in terms of addressing individual variations in completing developmental tasks. This represents an area anticipated by Havighurst when he recognized that developmental tasks are the result of both internal and external forces (1952), or the biological and psychological aspects of task-related behavior. In this regard it is important to note that Havighurst and most subsequent developmental task theorists have proceeded along lines of investigation similar to Buehler's by summarizing data in terms of nomoethetic formulations. An exception to this is Erikson, who has also generated "ideographic" descriptions using the developmental concepts in his epigenic biographies of Luther (1958) and Gandhi (1969).

Each of these theoretical formulations assumes cultural uniformity and regularity for the physiological, psychological, and sociological development of individuals as the basis for specifying life stages and related developmental tasks. It is this assumption that needs to be reexamined in light of new knowledge in human development. For example, Turner and Turner (1982) have elaborated upon this problem in a review of the literature on adult mental health and conclude:

> ... First, that conceptions of positive mental health reveal a marked social-class, and also a gender, bias. Writers have reached no consensus or have not seriously addressed the issue of what self-actualization, for example, in a lower-class, working-class, or even lower-middle-class context might look like.
>
> Second, cohort differences in mental health seem most apparent in gender comparisons and least apparent for social-class and race comparisons. The latter is unsurprising, since there has been relatively little change, overall, in indices of class and race equality, such as relative income. As Pearlin and Schooler (1978), among others, have pointed out, many life problems faced by individuals are rooted in social and economic organization and are impervious to individual efforts to cope with or change. In some cases, therefore, mental health impairments reflect the failure of social systems rather than the shortcomings of individuals.

Analysis, therefore, reveals a significant need to reconceptualize developmental task schema based on change or refinements in the basic physiological, psychological, or sociological factors. Examples in each of these areas are:

- Biological - Physical vitality and wellness or mind body integration.
- Psychological - The relationship of levels of moral (Kohlberg) or intellectual-ethical (Perry) development to the rate and nature of human development or progression through developmental stages.

- Sociological - Concepts of moral development based upon Gilligan's (1977) challenge of Kohlberg's male dominated ideas stressing differences in social class and pressure on sex development and Perlin and Schooler's (1978) concept of mental health impairments reflecting the failure of the social system rather than individuals.

The specific type of reconceptualization to be utilized for this research involves expanding the scope of the nomothetic developmental formulations to examine the specific social settings or social institutions that impact on the development of individuals. This means establishing the contextuality for the development of individuals in terms of specific social institutions and the institutionally imposed requirements for development or success. The next part of this review will address the problem of developmental tasks in specific educational and vocational-technical institutions and programs.

Work by Adams (1975) in the area of vocational guidance and training curriculum for the International Labor Organization (ILO)* was directed toward establishing a more complete application of developmental concepts to institutional settings. The vocational development conceptualization used by Adams involved the further delineation of Super's generic vocational development tasks to account for institution and occupation specific requirements that define the knowledge and skill requirements for success. The resulting conceptualization defines vocational development in terms of the growth of the individual in relation to meeting the occupational and training requirements established for a specific training program. The important dimension of the new conceptualization involves focus on the

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*International Labor Organization, Human Resources Development, Vocational Training Branch, Geneva, Switzerland.

development of individuals within the education, training, and work settings where learning takes place.

The work accomplished by Adams with the ILO was done in relation to the Modules of Employable Skills program (ILO 1975)--an innovative approach to vocational training designed to meet the training needs of the less industrialized and third world countries. The MES program was designed as a flexible-modularized curriculum to provide trainees with competencies to perform those work functions identified as the practical minimum for employment within the local labor market. The complementary guidance use of the vocational development tasks as an added dimension of vocational training provided a means of analyzing the training experience from the point of view of the trainee's development. The combined guidance and training system established a more comprehensive framework for training, giving the training institution a more comprehensive basis for promoting individual development.

This approach was also used by Adams (1980) in the design and development of the Appalachia Educational Laboratory college program. A description of the rationale for the college level program using a similar career development task conceptualization follows.

Student performance on each career development task is the result of personal initiative exercised with respect to meeting the institutional specific requirements for success at each level of educational development. Success for each career development task is (1) based upon one's satisfactory completion of preceding tasks possessing the elements of the new behavior required, and (2) the individual's ability to integrate already acquired competencies with the new competency needed for the more complex

functioning required by the current task. Analysis of career development of students over the entire range addressed by an educational institution will reveal the stages and corresponding tasks essential to success in a particular type of institutional setting.

Career development tasks are identified and described in terms of the functions to be performed by the individual. The sequence of tasks hypothesized for traditional students to successfully complete postsecondary education and enter into the next level of career development are as follows.

1. Adjusting to the college setting.
2. Establishing a career direction.*
3. Selecting a college major.
4. Managing the learning process (planning and using one's time and resources to accomplish career goals).
5. Integrating learning into a career identity (anticipation of entering and working in future occupation).
6. Planning the future (for employment and related life concerns).
7. Becoming employed (negotiating a work agreement and starting paid work--this may be delayed if graduate work is planned whereupon the student may drop back to task three and move toward seven again in the same institution or drop back temporarily to one by attending another institution).

The precise requirements for a career development task are determined by the type of institution and the unique characteristics of each institutional setting. The career development tasks at the postsecondary level

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*This step was originally part of the task selecting a college major but was separated and treated as a distinct career development task when discovered that a large number of traditional age college students did not understand career and as yet had not developed a clear purpose for being in college.

are easier to identify due to the fact that institutions are less complex than the larger culture and because of the shorter period of time spent in completing postsecondary education and the clear influence such institutions have on the educational development of individuals.

To some extent tasks of this nature are recurring in nature due to the fact that most individuals within our culture will have experienced this type of adjustment at least two or three times at prior educational levels before entering the postsecondary level. Recurring tasks, mentioned by Havighurst (1953), are those tasks that are generally similar in nature and repeat at several levels of one's development, being experienced in more specialized and complex forms at successive levels.

Still further adaptations are required in moving from a focus on developmental tasks associated with predominantly traditional college age students to work with adults in postsecondary two-year programs. The primary difference is the fact that the AEL career development study of college students (1980) revealed that the traditional students were, in O'Hara's (1971) terms, generally "vocationally deprived." That is, they moved from secondary to postsecondary school without developing a basic understanding of work in our culture or having established personal career goals. Adults, however, were expected to be different in the sense that they return to school for more specific career or occupational purposes. Another difference that would result in changing the tasks is the fact that students entering postsecondary two-year educational and vocational-technical training start directly in occupationally oriented majors which leaves little or no opportunity for general career exploration customarily found in many four-year college programs.

Another change of a more tactical than substantive nature involves shifting from the career or vocational focus of earlier work to a new focus on the educational development of adults. This was done to accommodate the lifelong learning focus of the project and project staff's interest in starting with a more basic learning orientation with regard to the previous work of the laboratory in the area of career development. The developmental task theory to be used, therefore, is based upon lifelong learning constructs such as self-initiated, planned, and directed learning; thereby giving stronger weight to the educational development of adults as the organizing framework for research.

This study departs from the earlier developmental task conceptualization. The first involves Havighurst's (1953) domain of social expectation and pressure as a source of developmental stages and tasks. Our departure is in terms of moving from the level of general social developmental requirements to address the requirements and/or stages of development associated with particular social settings. This involves, for the purpose of this study, conducting research at selected postsecondary institutions to determine the educational developmental requirements for success.

The second departure regards a corresponding shift from use of broader concept of developmental tasks to the formulation of a more proscribed conceptualization with focus on the educational setting, in which the educational development of adults occurs as the result of the interaction of the learner with the educational environment.

This reconceptualization of the task structures for adults provides the basis for the theoretical perspective of the Lifelong Learning Program.

Theoretical perspective. The Lifelong Learning Program will concentrate on five critical points in the educational-vocational development of adults. These points are specified in terms of the major developmental tasks occurring during the educational or vocational training. The tasks are sequential. The successful completion of each task involves a new level of personal competence and represents a higher level of integration in the educational-vocational development of the individual. The success achieved in each task is directly related to the degree of success experienced in earlier tasks. In addition to the linear nature of educational development tasks, the competencies involved for each of the tasks are integrative and cumulative. That is, the levels of performance achieved for the earlier tasks continue to refine and improve while the competencies needed for the current task are being developed. The five educational development tasks for two-year postsecondary educational-vocational training are as follows.

1. Making a commitment to return to school.
2. Managing the learning process.
3. Developing occupational competence.
4. Planning for employment.
5. Becoming employed.

Adult development is characterized by the learner's degree of success in developing the knowledge, skill, and attitudes essential in meeting the task requirements. The nature of each educational development task is dependent upon several personal-institutional factors. For example, educational development tasks #2 and #3 focus, to a large degree, on teaching and learning. In addition, therefore, to the actual classroom

learning experiences, such things as teaching and educational climate, institutional policy and regulations, peer interaction and influence, conditions at home, the use of support services, and the level of success achieved in teacher tests and motivation of adults must be considered as they affect the learning. These factors, potentially, can facilitate or impede adult learning and affect their success or failure within the institutional setting.

Factors can be of a personal or institutional nature. For example, the level of basic skills possessed by an individual can make the difference between success and failure. The more a prospective adult student knows about how the prerequisite competencies required for entry into a program relate to his/her present competencies, the more realistically he/she can plan educational experiences. If one's basic math skills are poor and studies start with elementary algebra, the extra work needed to keep up in class may be enough to discourage the student or preempt time needed to study other subjects. A corresponding institutional factor might be failure to identify the levels of math skills possessed by prospective students for placement into specific courses and for advising them on options available to help them bring math skills up to an acceptable level prior to starting class.

Also, conditions may occur where an adult learner may enter a school prior to completing the first task--making a commitment to return to school--and as a result be confronted with having to meet the requirements of the second task--managing the learning process--during the same period.

Unless the institution is sensitive to this type of problem and institutes suitable interventions, higher incidents of failure can result.

The research proposed for each of the five educational development tasks will result in the identification of the factors related to success and failure in educational training. This will provide a rational basis for the selection and development of appropriate interventions.

Educational development tasks for adults in postsecondary education in vocational training. An educational development task involves integrating the knowledge or subject matter content being learned, including specific skills with appropriate attitudes and values about work to meet the course, institutional, and occupational requirements for an educational and vocational-technical program. Growth occurs for an individual in terms of the cumulative integrating of new elements learned for each task and the developing readiness of the learner to move to the next task. The titles for the educational development tasks are expressed in terms of "functions to be performed" by the learner. Descriptions of the five adult educational development tasks to be used for this program are as follows.

1. **Making the commitment to return to school.** This task covers the process of formulating the commitment to return to school. The task starts at the point of initial consideration of education as a possible choice and continues throughout the admissions process up to the point of being accepted and starting in a regular program of study. The individuals to be included in this task include those who:

   - contact or visit the institution to learn more about programs, pick up program and application information, write to the institution to secure program and application information, or are specifically contacted by the institution and provided information about training programs and application procedures;

   - are referred to the institution for training from public and private agencies (ES, JTPA, secondary schools, employers, vocational rehabilitation, etc.);

   - initiate application procedures such as taking tests, being interviewed, etc.; and

   - engage in special or remedial training at the institution or elsewhere to meet matriculation requirements or develop the basic competencies prerequisite to entering a specific program.

2. **Managing the learning process.** This educational development task is important during the initial phase of the training program. It is during this period that the individual experiences the basic learning demands imposed by the teaching-learning process and must demonstrate learning capability in concrete ways. This is a period of flux during which exploratory behavior and self-evaluation occur to develop satisfactory ways of meeting course/program requirements. Success in meeting this task is a determinant for continuing in the program. Elements of managing the learning process are as follows.

   - adjusting to the learning environment/classroom/peers;
   - understanding course and performance requirements;
   - managing personal time and resources to achieve training requirements;
   - dealing with external factors and demands;
   - utilizing learning resources and support services; and
   - developing a sense of being able to learn and being able to adjust to and meet new learning requirements.

3. **Developing educational and occupational competency.** This task involves learning the integration of knowledge and skill with the attitudes and values to attain career relevance. Learning is translated into a sense of personal and occupational competence as the student acquires more education and gradually anticipates completing his/her program of studies and going to work. Doubts as to whether or not one can do fade and are no longer relevant while attention is focused more and more on learning course content and developing skills. This process involves the formulation of an "occupational identity" as the basis for anticipating success in training and looking forward to becoming employed in an occupation related to the training. Factors related to success with task are as follows.

   - mastery of occupational competencies;
   - understanding and accepting the process of training and recognition of the need to develop occupational competence;
   - readiness to learn and acquire values related to occupation; and
   - anticipation of becoming employed in an occupation related to preparation.

4. **Planning for employment.** This educational development task centers on the realization that educational preparation is nearing completion and a developing readiness and anticipation of going to work. The individual's planning gradually expands to include personal and family factors related to the choice of entering a specific occupation,

including preferences for working in a specific employment establishment or geographical area, etc. Factors related to success with this task include the following.

- expectation of completion;
- expectation of going to work;
- gathering information on employment prospects;
- awareness of personal and family factors affecting choice;
- utilizing information and support resources; and
- formulating tentative plan for finding employment including priorities for applying for a job.

5. **Becoming employed.** This task centers on the transition from the training experience to actual employment that will allow for continued learning and career development. The degree of success will be based upon the competencies developed through the preceding tasks. Factors directly related to success in this task are as follows.

- viability of employment plans;
- validity of information about labor market;
- ability to handle contingencies and replan;
- commitment to occupational goal;
- competency in presenting occupational expectations and competencies to prospective employer;
- understanding pay/salary and benefits;
- negotiating a work agreement that will make provision for continued learning and prospects for advancement; and
- entering and adjusting to a specific work situation.

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III. LIFELONG LEARNING PROGRAM PROJECT HISTORY

The following description of Appalachia Educational Laboratory's Lifelong Learning Program gives an account of the evolution of the concepts, activities, and findings as they progressed over a five-year period--1981-1986.

This section of the overall report results from Frederick Erickson's recommendation in a draft chapter of his upcoming Handbook of Research on Teaching, to include a description of the "natural history" of fieldwork or qualitative research. The major learnings and outcomes of the project are linked with the original concepts and assumptions of the research.

Background

When the Laboratory's proposal for 1980-82 operation was submitted, AEL requested support from the National Institute of Education (NIE) at a level of 120 percent of the established "target" budget. NIE agreed to this funding level but set a number of specific conditions for use of funds provided above the 100 percent level. Among those conditions was the requirement that a major assessment of the region's educational needs be performed in 1980 and that AEL's long-term R & D programs be refocused, if necessary, in 1981 to reflect the needs identified.

In response to a directive from the National Institute of Education in early 1980, the Laboratory conducted a needs assessment with the help of the departments of education of the seven-member states in the region to identify the most critical and pressing educational needs. This needs assessment and program planning process led to two major decisions impacting AEL's 1981-82 work. First, it was decided that the Laboratory's current, long-term R & D programs--Career Decision-Making and Childhood and Parenting Research--should

be phased out in an orderly manner beginning in 1981. Second, it was decided that resources should be allocated to permit the initial implementation of three new long-term R & D programs in 1981. These new programs were Basic Skills, Lifelong Learning, and School-Family Relations. Support for these program efforts was provided by reallocation of resources within the Laboratory's existing contract and grant from NIE for the 1980-82 period. One of the problems identified for the Lifelong Learning Program, as a result of the survey, was the need to find and implement mechanisms whereby the region's unemployed and underemployed adults could and would avail themselves in larger numbers of available training programs in their areas and become qualified for employment. The Lifelong Learning Program (LLP) grew out of a need to develop a better understanding of the learning involvement of educationally disadvantaged Appalachian adults.

The purpose of the Lifelong Learning Program was to conduct research to identify the variables that would enable disadvantaged adults to engage in learning as a means of self-development and adapting to social growth and change. Based upon the findings relative to these questions, the research agenda called for the development and testing of interventions that would help reverse the negative aspects of the educationally disadvantaged Appalachian adults. The specific research questions addressed are as follows:

- How do various groups of disadvantaged Appalachian adults perceive their need for lifelong learning and how do they respond to providers of learning opportunities?
- How do the providers themselves contact these groups and invite participation, determine program offerings, and respond to and/or reject members of disadvantaged groups?

- What are the actual learning needs of disadvantaged adults based upon the professional judgment and experience of specialists in health, education, and employment?

The proposal made in February of 1981 was subsequently reconceptualized based upon negotiations with the National Institute of Education and redirected toward the study of adult vocational development. The addendum to the original proposal was submitted in 1981 and was approved.

This reconceptionalization of the regional problem led the Appalachia Educational Laboratory (AEL) staff to explore in more detail the process whereby an individual adult acquires the educational and vocational training essential for employment. The basic assumption made is as follows: many adults lacked a sense of career direction and were unaware of the vocational programs available. Many encountered barriers when trying to enroll in training programs, and others had difficulties in meeting learning requirements or found the programs they selected were not what they had expected and not related to their interests. These factors tended to result in adults either failing to enter or dropping out of school before successfully completing training.

Early strategy planned by the Lifelong Learning Program staff was to use qualitative research methodology to study adults in selected regional institutions. Using qualitative methodology, the study would identify both personal and institutional factors related to adults' success or failure in entering vocational training, completing studies, and becoming employed. These results would then be used to develop interventions (strategies, programs, materials) to improve the effectiveness of the region's institutions in providing adult learning opportunities. The vocational

development of adults was selected as a framework for the study of the educational development of adults based on the assumption that, although all training is different in content, it is not different in terms of the overall vocational development of the individual.

Adams had previously refocused Donald Super's definition of vocational development as a set of stages that characterize the developmental process throughout the lifetime of an individual (Super, 1963) to include the growth of the individual in relation to meeting the educational, occupational, and training requirements established for a specific training program. The requirement for each vocational development task is a composite of personal-institutional factors. According to this concept, an individual's development occurs in terms of the exercise of initiative within the context of the educational, training, or work setting where learning takes place. Adult development is characterized as the result of the learner's exercise of personal initiative in acquiring the knowledge, skills, and attitudes essential for completing the required tasks.

Early planning of the LLP grew out of this concept of vocational development in terms of a series of defined tasks; success for each task is based on satisfactory completion of the preceding task. The sequence of tasks are: (1) Making a Commitment to Vocational Training; (2) Managing Learning; (3) Developing Occupational Competency; (4) Planning for Employment; and (5) Becoming Employed. Project planning was to conduct research and

development on each of these tasks or stages of learning over a period from 1981 through 1987.

By employing these stages of learned tasks as the organizing reference for research and development, it was initially considered to be possible to study the various steps in vocational development simultaneously by using different adult subjects. It was felt initially that this task structure conception obviated the need for a single longitudinal study of one group of adults as they progressed through the whole vocational development process. Instead, the task structure would provide a framework for meaningfully studying a different group of adults engaged in each task of vocational development. By working with providers of vocational training, it would be possible to identify groups of adults engaged in any particular vocational development task in the setting of a normal educational or training experience. This assumption was later on shown to be untrue. It was not possible to conceptualize and define a developmental task in detail necessary to conduct qualitative research until the research data, interpretation and findings of the prior developmental tasks were complete. This meant that the original overlapping design for the study of the five tasks had to be changed to a sequential design. The changed conceptualization, however, was not that an adult population had to be studied longitudinally, but that the tasks themselves needed to be defined and fully explicated before the next or subsequent task could be addressed in any detail.

Plans for research and development were made under the assumption that efforts could have early payoffs as each task was approached in sequence,

with resulting interventions that would be designed, tested, and made available for implementation at each phase of the research. Research findings at each stage would be used in the planning and design of research for the following developmental task. This assumption proved to be acceptable. Interventions for Task #1 were completed and put into limited use before the research and interventions for Task #2 were completed.

Another basic assumption held by the LLP staff at the onset of the project, was that educational or vocational development correlated directly with the teaching-learning process that had not been adequately studied. A major focus of the study would be to examine the interactive role of the institution and adult learners throughout the five stages or tasks of vocational development associated with postsecondary educational and vocational technical preparation. The admissions process and other institutional procedures would be viewed as a framework that could either facilitate or impede adults' successful entry and completion of school. Observations of the ways learning took place in relation to various institutional processes could bring more understanding of how adults either mastered or failed to master each vocational development task while observations of the ways adult students engaged in learning could together suggest possible interventions that could be developed to assist students in handling the common problems or barriers that impede their success.

The research design thus anticipated that adults engaged sequentially in the five vocational tasks would confront various situations that would either facilitate or impede their successful completion of that task. It

was believed that some factors would stem from the individual learner's personal characteristics or circumstances; while others would be related to the training institution, its requirements, procedures, programs, services, and other characteristics. The project would, therefore, seek to identify these factors and then design interventions to moderate the effect of key impeding factors and to enhance the effects of key facilitating factors. These interventions would be implemented in collaboration with the cooperating training institutions, and their effectiveness would be assessed. Using the vocational development of adults as the framework for the research made it possible to conduct studies that involved a few typical postsecondary institutions and to develop interventions that would be potentially useful across an even wider range of institutions involving similar populations.

During early FY 85 when LLP staff became more involved in regional and national dissemination it became more apparent that the terminology adapted for the research posed some semantic problems for many postsecondary administrators and faculty. The term vocational in vocational development task had to be reevaluated in light of the semantic orientation of post-secondary dissemination audiences. The term holds less specific meaning for college level personnel and appears to indicate a more remote occupational or trade school orientation. It was, therefore, decided to change the term vocational development task to educational development task to eliminate possible misunderstanding. This change in terminology does not in any way affect the LLP concept of developmental tasks. The original selection of

the term was based upon the fact that adults engage in education for employment or career purposes which describes their longer range goals. Short-term adult goals are related to school and focus on their educational development and, when presented in such terms, help to make LLP research more relevant to college personnel. The change serves to bring out, in a clear way, the role education plays in adult development. In this sense, the change strengthens the LLP concept by highlighting more specifically the contribution of education to adult vocational and career development. This holds true for each of the five educational development tasks including Task #5--becoming employed in an occupation related to one's education and training.

The timetable for the study and development of appropriate interventions for each of the five educational development tasks was plotted in terms of the following model or stages:

A. Problem Investigation

B. Intervention Design

C. Pilot Testing and Revision

D. Field Test and Revision

E. Product Finalization

F. Dissemination.

Since anticipated resources did not allow for implementation of research and development on all five of the tasks of educational development, LLP staff decided to divide the work into several phases.

II. SELECTION OF RESEARCH SITES

During Phase One, September 1, 1981 through November 30, 1982, a review was made of selected postsecondary institutions in five of the seven state AEL Region to identify two research site institutions within 3-3.5 hours driving distance from AEL's headquarters in Charleston, West Virginia. This restriction was made necessary because of budget cuts that affected all R & D projects and because of the amount of time that would be needed to conduct the research necessitated that automobile travel be used instead of airline travel to conduct field work. Based on the criteria, for the selection of the LLP research sites stated in the proposal and additional criteria developed in collaboration with Dr. Donald Kinzy, external consultant, seven regional institutions were selected for site visits--Hocking Technical College, Nelsonville, Ohio; Parkersburg Community College, Parkersburg, West Virginia; Southern West Virginia Community College, Logan, West Virginia; Washington Technical College, Marietta, Ohio; Wytheville Community College, Wytheville, Virginia; Ashland Community College, Ashland, Kentucky; and Southwest Virginia Community College, Richlands, Virginia.

In the course of selecting research sites, LLP staff visited and talked with key administrators at all seven of the postsecondary institutions. In addition to meeting the general selection criteria, Ashland and Southwest Virginia Community Colleges were found to have significant comparative characteristics which would serve to strengthen the proposed research and make the combined sites more representative of the schools throughout the region. These colleges together were considered to be representative of the public, postsecondary institutions in the region which emphasize one and

two-year education and occupational preparation programs for adult students. Both schools agreed to become research sites and indicated their commitment to collaborate in the study. The other five schools all indicated their interest in the project and willingness to participate in the piloting and field testing of interventions. These schools were asked to serve in an advisory capacity as a Consortium Group which would also include the two research sites. As the study progressed, this group became more and more involved in project planning and activities including the selection and implementation of interventions.

Results of this first phase of work in the Lifelong Learning Program were published by AEL in Technical Report Number One, which gives a description of the process used for site selection and the two research sites chosen.

III. EDUCATIONAL DEVELOPMENT TASK #1: ADULTS MAKING A COMMITMENT TO RETURN TO SCHOOL

Work on the first Educational Development Task (EDT), Making a Commitment to Return to School, was initiated in September 1981 at the two research sites, Ashland Community College (ACC) and Southwest Virginia Community College (SVCC). The guiding question behind research was, "What are adults' perceptions of the factors that facilitate and impede them in making a commitment to return to school?" This first developmental task was considered to start at the point of initial consideration of returning to

school and continue throughout the admissions process up to the point of starting classes. It covered the process of formulating a commitment through clarifying and integrating personal values in terms of knowledge about educational/vocational opportunities for achieving career goals.

The first stage of the R & D process, the problem investigation stage, covered the following three phases: context analysis, problem identification, and problem specification. Qualitative research methods were used through all phases of the study including the context analysis phase during which the LLP staff observed the admissions process and talked with administrative staff, instructors, and adult students at both research sites. The purpose was to develop a comprehensive data base for the development of instruments and procedures to be used in the more formal problem investigative phase planned for August and September of 1982. Resulting data provided a general understanding of the admissions, registration, and advising processes.

Instruments and procedures were developed for formal data collection with the help of two external consultants: Dr. Stephen Hamilton, a specialist in ethnographic research from Cornell University, Ithica, New York; and Charles Bailey, of the Appalachia Development Center, Morehead State University, Morehead, Kentucky, who has extensive experience in working with Appalachian adults. During August of 1982, LLP staff met with Hamilton to finalize data collection instruments and train two interviewers (one male and one female) from each research site. In order to identify factors that facilitated or impeded adults returning to school, two

popuations of students were selected for interviews: adults who started the admissions process but did not complete registration and adults who enrolled in school and started classes. Two different interview guides were designed with the help of Dr. Hamilton for these groups. The sample adult student population to be studied was selected from the total population of adults who met the criteria: (1) twenty years of age or older; (2) interrupted educational experience; (3) having freshman status; (4) no prior post-secondary education; and (5) enrolling in at least two classes for more than five credit hours.

Based on this criteria, a total of 30 males and 26 females at both field test sites were randomly drawn from the larger adult population identified as those who completed registration and enrolled in classes. Using the same random selection process, 23 females and 22 males were identified at both sites as nonenrolled adults who failed to complete registration. Private interviews were conducted by a same-sex interviewer at each school, and interviews were transcribed verbatim. Responses to each interview question were summarized for each interviewee by one of the Principal investigators, and responses to each question were then examined across all interviews.

Problems occured to some interviewers' who had extreme difficulties in contacting nonenrollees and arranging for interviews and in the failure of one male interviewer to complete his interviews. Although the research design called for interviews to be completed during the first two weeks of classes, the interview period was extended to include the first half of the

Fall Quarter at one site due to late registration and delay in receiving computer printouts of enrolled students. This resulted in difficulty because some students interviewed in terms of Task #1, Making a Commitment to Return to School, were already involved in Task #2, Managing Learning, by the time they were interviewed.

In order to carry out the complete research design within the time period allocated, it was necessary to begin work on EDT #2, Managing Learning, during the same initial period that work was underway for Task #1, Making a Commitment to Return to School. Preparation was made for presenting this Task to advisory groups at both sites.

A description of the early research involved with Task #1, Making a Commitment to Return to School, was published by AEL in Technical Report Number One. This document describes procedures used to identify facilitating and impeding factors based on analysis of interviews and prioritizing of factors. Analysis of interview data from EDT #1 was completed during the spring of 1983. Results were presented, summarized, and categorized according to personal, situational, or institutional factors identified by sample adult students. All basic categories of factors mentioned by interviewees were included in the summaries. Precautions were made to avoid as much as possible an interpretation of data in order to provide a full range of factors affecting adults.

Planning strategy for Task #1 interpretation of data and selection of interventions involved direct input from advisory groups from the two research schools and from the larger consortium group made up of all seven

of the schools originally considered as sites. During this Problem Specification phase of the research and development, the object was to involve institutional staff as much as possible in the identification of critical facilitating and impeding factors related to adults making a commitment to return to school. Meetings with advisory and staff groups at each research site were held during May 1983 to provide members an update on the LLP and to involve them in the rating of critical factors for EDT #1. This joint analysis of data and rating of factors resulted in a prioritized listing of all 101 facilitating and 93 impeding factors mentioned by adults as affecting commitment.

Following advisory group meetings at research sites, representatives from the seven consortium schools met in Charleston during the Spring of 1983 to further interpret and review the data from EDT #1 and to validate the facilitating and impeding factors rated as most critical by the two research sites advisory groups. A card sort procedure was used to group factors which related to the same concepts. During this meeting, an Admissions Process Model, developed by the LLP staff during the context analysis of Task #1, was presented to the group for further discussion and refinement. This model, which was developed through observation of the admissions process, interviews with key administrative staff and adult students, and a review of professional literature on college admissions, was designed to show the sequence of steps or procedures followed by institutions during the admissions and registration process. Consortium members were asked to discuss the model and describe the corresponding steps that individual adults went through as part of the admissions process.

Emphasis was on facilitating adult commitment while admissions was in progress. This model was later refined and completed as an organizing framework for developing interventions to address the critical factors affecting adults in making a commitment to return to school. Consortium members were encouraged to discuss possible interventions and criteria that could be used in the selection of interventions.

IV. INTERVENTION SELECTION AND VALIDATION FOR EDUCATIONAL DEVELOPMENT TASK #1

The critical factor categories identified as facilitating or impeding adults' commitment to enter school provided the framework for identifying and selecting interventions. Ideas for interventions, which were generated during the Consortium Group Meeting in July 1983, were used as the basis for designing, developing, and validating specific interventions.

In order to involve participating institutions as much as possible in the selection of interventions, an Intervention Planning Meeting was held at Jenny Wiley State Park near Prestonburg, Kentucky in July 1983. Participants included a wide range of research site personnel, such as administrators, counselors, faculty and support staff members, who had contact with adult students. Guidelines used as a process for evaluating prospective interventions were finalized prior to this meeting, but they were not formally announced or used in any way that would affect a free generation of ideas.

This meeting resulted in a wide range of ideas and recommendation for interventions. It was more difficult than originally expected, however, to

get institutional staff to think in terms of the adult student's perspective; many staff members were uncomfortable looking at admissions from the adult's viewpoint instead of the institution's. Participants tended to move immediately to consideration of what could be done rather than giving thoughtful exploration and understanding of adult concerns.

As a follow-up to this meeting, LLP staff held meetings at each research site with advisory groups to review the critical factors and recommendations for interventions. Each recommendation made at the Intervention Planning Meeting was discussed and evaluated, and those that were most appropriate for each school were identified. A list of interventions was made for each institution and defined in terms of the agreed-upon Intervention Requirements and Specifications which served as a working agreement for carrying out work responsibilities of LLP staff and research site staff. A total of nine meetings at ACC and 11 at SVCC were held in order to allow the LLP staff opportunity to broker the refinement of recommended interventions between both institutions. By the time this process was finished, a list of 13 interventions was agreed upon.

The design, development, and validation of these interventions took considerable time and many trips to research sites. The interventions were developed and refined over a period of time starting in the fall of 1983 until the last were field tested and finalized by early 1985. The level of activity and time needed to develop and validate the interventions was several times higher than originally expected due to several factors: (1) the unexpected number of interventions that emerged as a result of the

findings for EDT #1 and discussions with participating institutions; (2) the unexpected time and level of activity that was necessary for research site staff to undertake new work involved in the interventions. Although advisory groups and staffs at each school were committed to the project and the nature of adult students' problems, it was necessary for them to constantly confront new priorities in handling their normal responsibilities and participating in the Lifelong Learning Program. As a consequence, additional time had to be allowed each institution to make decisions and develop input. Meetings and other development and training activities had to be arranged at the convenience of research site staff and schedules. In addition, a reduction in LLP staff occurred when Dr. Sandra Barker resigned to take a position with the West Virginia College of Graduate Studies. After an extensive recruitment process failed to result in a candidate with the required level of competence, it was decided to use external consultants for much of the intervention design work and delivery of pilot workshops. Although the number of interventions agreed upon was considerably larger than anticipated, a decision was made to design all 13 since it was felt that this would have more immediate payoff through high-impact deliverables. In the process of development and validation, the original 13 were expanded into 15 and then combined and finalized into the following products.

The Admissions Process: Administrative Handbook

There were several major aspects of the admissions process that were identified as problem areas. These involved the institution knowing who was in the admissions process and at what step; adult learning with respect to

admissions and placement testing and test interpretation; lack of services and resources to promote learning with respect to the career aspects of educational planning; insufficient and/or inappropriate admissions materials; and inadequate time and services provided for adults making an initial contact with the institution. The following resource materials are intended to address these areas of concern.

- Admissions Management Information Tracking System (ADMITS). A microcomputer system that tracks prospective students through the admissions process and makes it possible to provide follow-up assistance for those having difficulty.

- Validation of Placement Tests. Provides guidelines for local validation of placement instruments and for the development and use of interpretative materials to help new students understand their academic strengths and weaknesses.

- Toll Free Telephone Access Number. Provides prospective students with a convenient means of responding to recruitment initiatives, asking questions, and talking with institutional representatives.

- Information Booth. Provides prospective students with information and other assistance during periods such as registration so as to free admissions office staff for other tasks.

- Reading Level Analysis of Admissions Documents. Develops procedures for identifying and, when necessary, rewriting admissions documents to reading levels suitable for new students.

- Educational Planning Resource Center. Provides resources for student services staff and academic advisors in helping new students in career exploration and planning and supports the Educational Planning Course.

The Admissions Process: Staff Development Handbook

Five training packages were designed to help staff understand adult concerns and to develop more effective ways of communicating with and

helping adults formulate a commitment to return to school. Four training packages are for administrators, faculty, academic advisors, and student services staff involved in admissions. The last is designed for admissions office, secretarial, and clerical staff who have contact and work with new students during the admissions process. The training packages are as follows.

- Research Findings. Introduces research design, findings, analysis, and interpretation and interventions for helping adults.
- Academic Advising and Counseling Staff. Provides staff with an opportunity to examine their roles with respect to helping new students develop commitment.
- Adult Commitment. Provides opportunity for staff to take an indepth look at concept of commitment and at learning as the primary means of fostering it in work with prospective students.
- Educational Planning Resource Center. Provides academic advisors, counselors, and library staff with information and practice in using educational and career resource materials during the admissions process.
- Admissions Office and Support Staff. Helps sensitize support staff to understand the interests, motivations, and apprehensions of adults during the admissions process and the importance of their role in establishing positive and supportive relationships with them at each step of the admissions process.

The Admissions Process: Audiovisual Information Development Guide

Three sound slide programs provide an information delivery system to help adults understand the basic information required for admissions, the nature of program offerings, and special assistance available as part of the admissions process. The three sound slide programs are as follows.

- Application Process. Presents a complete overview of the requirements, forms, and procedures for the application process, including financial aid.

- Academic Adivising Process. Presents information regarding program/course selection and the role of the academic advisor.

- Registration Process. Presents basic concepts about credit hours, tuition, and registration forms and procedures.

Educational Planning Course

The Educational Planning Course has been designed as a pre-matriculation experience delivered either as an independent course or through continuing education to assist adults in building self-confidence, exploring their ability to do well in an educational setting, and organizing their thinking and ideas related to educational and career planning. The target group for the course is adults who are prospective college students and, in particular, those who are in the first three steps of the admissions process. The product is as follows.

- Instructor's Guide and Student Handbooks for Modules A, B, and C. Contains photoready copy for:

  - Module A: Establishing an Occupational Preference.
  - Module B: Developing a Career Plan.
  - Module C: Preparing for Job Hunting.

Members of the consortium group convened in July 1984 to be given a complete update of the interventions which were completed. This group served in a first-level advisory capacity for disseminating interventions. A design for utilizing the interventions was presented and later refined with research site advisory groups. Planning involved the use of intervention management teams to develop strategy for implementing interventions at each site.

V. EDUCATIONAL DEVELOPMENT TASK #2: ADULTS MANAGING LEARNING

Due to the specified time frame for the Lifelong Learning Program activities involved with EDT #1, Making a Commitment to Return to School, necessarily had to overlap with those required for EDT #2, Managing Learning. For the same reason, work was also initiated on Tasks #3 and #4 during this same period.

The guiding question behind research and development in Task #2 was, "What are adults' perceptions of the factors that facilitate and impede them in developing the ability to manage their own learning?" Assumptions were that this task involved a student's management of time and personal responsibilities in order to meet the requirements of initial courses of study.

Context analysis for Task #2 was conducted during August through November of 1982, during the same period that work was in progress for Task #1 Case study methodology was used to study institutional policy and procedures through informal interviews with administrators, instructional staff, and adult students. This included examination of the roles and responsibilities of administrators, faculty, academic advisors, student services staff, and clerical staff in terms of their work with adults during their first term of school. Analysis also covered an in-depth look at institutional requirements, procedures for registration changes, academic adivising, instruction, classroom management, course syllabi, instructional materials, assignments, testing, and grading. The major purpose was to examine all the factors that influence adults' learning during the first few weeks of school and to isolate impeding and facilitating influences.

Using the same criteria that were used in Task #1 for selection of a new sample adult student population, LLP staff examined class schedule cards to identify first-term students taking at least two courses for five or more credit hours. School records were analyzed to find classes with five or more target students. By mid-October 1983, a sample population of 189 adult students (114 females and 75 males) were identified. Two target groups were chosen for the study: those who had completed registration and were enrolled in classes and those who had applied for admission, registered, and then withdrawn.

General procedures and instruments for analysis were developed, pilot tested, and refined prior to the Problem Investigation phase which occurred during the fall of 1983. Instruments for data collection were then reviewed and further refined with the help of Dr. Kathryn Borman, consultant from the University of Cincinnati, who temporarily replaced Dr. Stephen Hamilton.

The plan for data collection involved a triangulated approach making use of personal interviews, daily diaries kept by students for a period of one week, and classroom observations to allow for three different, but overlapping views of adult experiences during the first term of school. Researchers were thus given a better chance of filling in gaps left by any given method and of cross-checking one type of data with another to establish both corroboration and contradictions in data. Qualitative methods were used in order to develop a broad descriptive base of information. In addition, student records were analyzed for specific information that could be used for further cross-study of factors influencing adults' early adjustment to school.

With the help of Dr. Borman, classroom observation procedures were formalized into a structured approach that could account for all types of classroom interactions. In addition, a revised observation log was designed to enable observers to reconstruct each class meeting in terms of communication modes and instructor-student participation. Learning activities could thus be standardized and summarized for each class observed. A reading level analysis of textbooks and assigned readings was also used as part of class observations to further identify possible barriers to learning.

Analysis of factors involved in students' management of time personal responsibilities, and school requirements was made through the design and use of daily diaries that were given target students to record their hourly activities for one week. An improved interview guide was designed and finalized for use in the analysis of personal factors related to learning.

Changes in the scope and methods of research at this time reflected improved approaches and the growing complexity of the project as it evolved. Not only were the methods and instruments for data collection improved and refined for Task #2, but other decisions were made that gave more control over collection of data and quality of results. Instead of using locally hired people at research sites for the student interviews, LLP staff were trained to conduct the interviews and make classroom observationas. Three staff members--Phyllis Stowers, Kim Cowley, and Walter Adams collected data.

The many field trips made by staff, to both schools, during this period involved numerous meetings with advisory groups, administrators, staff

members, and instructors in addition to the work involved in collection of data. The scope of work for Task #2 was much larger than anticipated because of the use of additional data collection methods. These changes increased the field time required for class observations and data collection, resulting in additional work for staff.

The work period for Task #2 was also extended due to the need for a longer classroom observation period to allow sufficient time to study adults during the first few weeks of school when they were experiencing Task #2 requirements. During this extended ten-week period, staff made a total of 97 observations at both research sites. Other delays were encountered in the selection of sample adult students at one research site. Because of a lack of convenient access in using registration and enrollment data at the close of registration, the sample adult population could not be identified until after the period for class observations had begun. At the other school site, the sample population resulted in a smaller number of males due to lower registration, drops, adds, and withdrawals after identification of the target population. Difficulty was also encountered in getting data from adults who had withdrawn from school after the start of classes. These individuals were sent withdrawal survey forms and telephone interviews were held to identify reasons for withdrawal.

Selected interviews of enrolled adults focused on a broad range of questions having to do with personal, family, financial, or institutional factors which might be contributing to success or failure in their attempts to manage the requirements for learning. Analysis of interview data, survey

data, and daily log data was made by John R. (Jeff) Clause of Cornell University. Results of this, along with a complete description of Educational Development Task #2, Managing Learning, are given in Technical Report Number Two published by AEL. Included is an analysis of sample students' daily time logs which was made with the assistance of Mary Richmond, consultant from Charleston, West Virginia. These results and others are given in demographic chart form.

VI. INTERVENTION, SELECTION, AND VALIDATION FOR EDUCATIONAL DEVELOPMENT TASK #2

In preparation for the Problem Specification phase of Task #2, LLP staff met with advisory groups at both research sites to interpret results and prepare for discussions of possible interventions. During a meeting of the consortium group July 26-27, 1984, the first draft of Technical Report Number Two and results of the data analysis were presented to representatives of the two research sites and the five consortium schools involved. Results of the data analysis were reviewed as a resource document for the upcoming Task #2 Intervention Planning Meeting which was held in Charleston on November 2-4, 1984. During this two-day period, twenty-five representatives from the two research sites and five consortium schools were led by LLP staff and consultants Jeff Claus and Mary Richmond through an intensive examination of Task #2 data. Participants worked in small groups to identify critical facilitating and impeding factors that emerged from the data. Possible interventions were suggested through discussion and prioritizing. Participants were encouraged to identify interventions that

could be "piggy-backed" on those already developed for Task #1. From a lengthy list of recommendations, participants voted on five strategies that they felt would have the greatest impact on adult learning.

In December 1984, Walter Adams, LLP Project Director, met with advisory groups at each site to make final selections of Task #2 interventions. After further analysis and integration of the original recommendations and priority ratings, a list of five interventions were selected:

1. ORIENTATION PROGRAM--Consists of design specifications for several modules that can be included in a one, two, or three-hour credit program provided adults during the first term of school.

2. INSTRUCTIONAL STAFF DEVELOPMENT--Designed to provide faculty and instructional staff with systematic exposure to current theory and practice in teaching and learning.

3. READING LEVEL ANALYSIS--Provides guidelines for conducting reading level analysis of college textbooks and other instructional materials.

4. COMMUNITY RESOURCES COMPONENT: EDUCATIONAL PLANNING RESOURCE CENTER--Involves procedures and guidelines for developing and utilizing a community resources component of an Educational Planning Resource Center.

5. PROGRESS MONITORING SYSTEM--Involves use of a microcomputer to gather and organize information on a regular short-term basis to identify students experiencing difficulties in school.

The additional time and resources needed for development and validation of Task #1 interventions caused some delay in the progress of Task #2. A major problem encountered was the difficulty in getting research site staff to initiate and complete their responsibilities related to interventions for Task #1 within the projected time schedule. In spite of efforts to set up

intervention management teams to carry out the work, it was very difficult to get research site staff to follow through on implementing intervention strategies after they were designed. Due to this problem, a restructuring of the approach for interventions was made so that institutions would have to take more direct action in their design and implementation. Task #1 interventions were simply delivered as staff training, but they did not change or affect school policies or concepts; in contrast, Task #2 structures allowed for the institutions to develop their own capabilities for making changes.

VII. CONCURRENT RESEARCH AND DEVELOPMENT ON OTHER EDUCATIONAL DEVELOPMENT TASKS

The selection of intervention designs for Task #2 was completed during the first quarter of 1985. Work stopped at this stage, however, because of a directive that was sent all laboratories by the National Institute of Education. Early in 1984, AEL was told to conclude all research by November of that year and to use FY 1985 as the year of dissemination. This resulted in discontinuing work started on Tasks #3, #4, and #5 and using resources to finalize and disseminate work already completed.

Plans for Task #3, Developing Occupational Competency, began in August 1982. This study involved adults enrolled in second-year studies that would be typical of learning experiences required for work-related goals. Assumptions were that this stage required an integration of personal values and attitudes with specific occupational goals.

Context analysis for Task #3 was completed during Spring 1983. Academic programs in which adult students would be experiencing the requirements of developing occupational competency were identified at each school site. Plans were for LLP staff to visit key classes in each program on a regular basis and talk with students, instructors, counselors, and administrators. Target adults in their second year of school were identified through school records and meetings were held with division chairmen and instructors for target programs to explain the purpose of EDT #2 and to acquire their permission to conduct classroom observations.

Using similar methods for data collection that were used for Task #2, staff began classroom observations at both sites. Major focus was on classroom performance and learning behavior. Procedures were also developed for determining the reading level of textbooks used in critical courses. On the basis of this, one class was identified as a critical "make or break" course that was causing considerable difficulty for students enrolled.

Work on Task #3 fell behind schedule because of the heavy workloads for Tasks #1 and #2. Therefore, a limited number of classes in the target programs were visited and adults were only informally interviewed. With the rescoping of work for 1985 due to the NIE directive, Task #3 activities did not go beyond the context analysis stage. During this same period, part of the context analysis for Task #4, Planning for Employment, was completed. However, work was discontinued here since it was learned that more time than anticipated would be needed. A decision was made to stop work on Tasks #3 and #4 and to use resources to finalize and disseminate work already completed.

VIII. DISSEMINATION OF LIFELONG LEARNING PROGRAM

Plans for dissemination of the LLP included general distribution of the interventions to project schools and at regional and national professional meetings. Because of the limited time frame, in-depth dissemination of materials and results was not possible. In November 1984, Walter Adams, project director, made a presentation, "Study of Adults Making the Commitment to Return to School," at the annual conference of The American Association of Adult and Continuing Education at Louisville, Kentucky. Adams made another presentation of Tasks #1 and #2, "Adult Vocational Development," at the Seventh Nationwide Education Dissemination Conference held by the National Center for Research in Vocational Education in November 1984. He also presented findings and interventions from Task #1 to representatives of all the community colleges in Virginia and with state-level administrative staff during a February 1985 meeting of the Virginia Community College System and Records Conference in Charlottesville, Virginia. Personnel from both two- and four-year colleges in West Virginia were given a presentation in April 1985. Statewide dissemination conferences were held for each state in the AEL Region--West Virginia, Virginia, Tennessee, and Kentucky starting in October 1985 and ending in May 1986.

These conferences were held to introduce the LLP research findings and interventions for Tasks #1 and #2; to establish an informal network of colleges and universities in the four-state AEL Region; and to identify resource people as part of the network. As a result of the dissemination conferences thirty-three resource people have been identified.

On August 4-6, 1986, a special Network Conference was held in Bluefield, West Virginia. This final conference was held to consolidate the LLP Network and establish the Center for the Study of Higher Education, Memphis State University, as the focal point for coordination of future regional and national dissemination activities.

On a national scale, Adams made presentations on the LLP to the American College Personnel Conference and the American Educational Research Association in March and April 1985. Other presentations were given at American Association of Adult and Continuing Education in Lexington, Kentucky, and at the national conference of the Center for the Study of Higher Education at Memphis State University.

IX. OVERALL EXPERIENCES RELATED TO LIFELONG LEARNING PROGRAM AND ITS RESULTS

Results and experiences of this four-year study support the initial assumption that lifelong learning in an educational setting requires successful completion of a series of tasks, each of which must be completed before moving on to the next. Using qualitative methods to study adult students from many perspectives--both personal and institutional--gave researchers a comprehensive view of the context within which educational development occurs. This context involves an important process that has received very little study or attention--the process of adult learning itself.

Results of Educational Development Task #2 support the view that, for the most part, institutions function independently of clear knowledge or concepts about how learning takes place. As a result, adult students often have external or artificial constraints placed on their ability to manage learning. Task #1 studies show that, typically, the admissions process is operated and conceptualized from an institutional point of view. Analysis of adult experiences and institutional procedures revealed that there is no systematic conceptualization within the institution that takes the prospective learner into consideration during the admissions process. Some of these impediments to entering school were reflected in the analysis of the reading level for admissions documents which showed average reading levels of grades 16 and 17 for materials read by incoming students.

Both personal and institutional factors that were identified as blocking adults' successful entrance and completion of first-term studies point to the potential fragileness of self-directed learning. When adults fail to gain a clear sense of commitment for entering school, when they are unclear about their own values and goals, and when their reasons for being in school cannot be integrated with the courses they are taking, they fail to gain a sense of personal control over the learning process. Without this, chances for successful completion and entrance into satisfactory work are diminished.

Supporting these findings are statistics that emerged from Task #2 data: of the 397 target adults who registered for classes at both research sites, 21% withdrew within the first several weeks and an additional 24% did

not register for the next term. This represents a 45% noncompletion rate. Also, of the 55% survivors, some were marginal in terms of having made a commitment to return to school or having met the requirements for managing learning.

The study as a whole provides a conceptual tool for clarifying and organizing important aspects of adult learning during the initial period of school. Demographic findings based on Task #2 show the need for innovative changes to facilitate this learning process and integrate it more fully within the entire institutional framework.

The Lifelong Learning Program proved to be a much larger and more complex project than anticipated. As work evolved and new barriers and facilitators to adult commitment and learning were identified, so too did the need for more innovative and widespread solutions for creative change. To illustrate this growing complexity, the examination of the admissions process during Task #1 was found to involve a complex network of institutional staff and policies. Finding solutions that could facilitate adult commitment during admissions was much more complex than what could be done by a few interventions delivered to the institution. Thus, a major learning that resulted from the project was that no short-term or simple solutions are available in creating and implementing innovative change to facilitate adults' success in school. Conclusions point to the need for a coordinated and orchestrated manner of change that can address all people and policies involved.

IV. EDUCATIONAL DEVELOPMENT TASK #1
ADULTS MAKING THE COMMITMENT TO RETURN TO SCHOOL
RESEARCH SUMMARY

Introduction

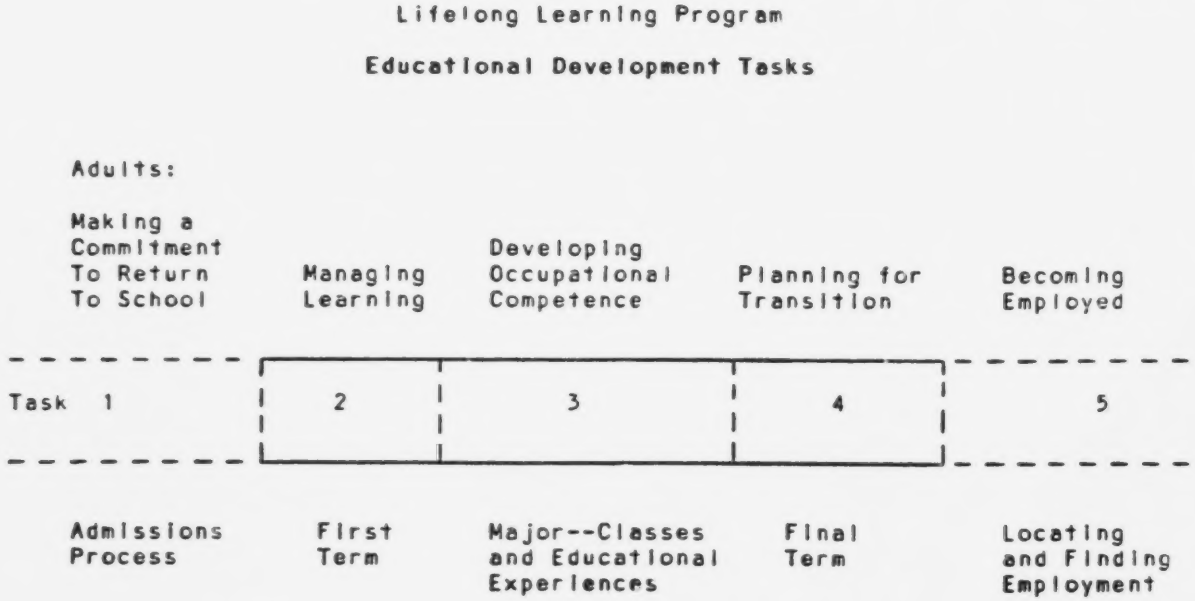
Qualitative research methodology was used to study adults at two community colleges during the 1981-83 fall admissions periods to determine the factors that facilitate and/or impede formulation of the commitment to return to school. Results support the view of admissions as a learning process that is essential for adults in developing the commitment to return to school. These findings were used as the basis for identifying and validating interventions designed to enhance facilitating factors and/or moderate the effect of impeding factors affecting adults' decisionmaking and action.

Theoretical Perspective

The first in a series of five Appalachia Educational Laboratory (AEL) Lifelong Learning Program (LLP) studies of adult development focused on the educational development of adults in making the commitment to return to school. The educational development of adults was selected as the framework for the LLP research because although educational and vocational-technical training programs differ in terms of content, the developmental sequence adults experience as a result of education and training is regarded as more uniform and consistent. This view makes it possible to conduct research at a limited number of institutions and to develop and test interventions that will be potentially useful across a wider range of similar institutions and programs.

In the Lifelong Learning Program, adult development is defined in terms of Educational Development Tasks that describe the requirements adults must meet to be successful in entering and completing educational and vocational-technical training programs (see Figure 1 below). These tasks are, adults: (1) making a commitment to return to school, (2) managing learning, (3) developing occupational competence, (4) planning for employment, and (5) becoming employed. Success for each task is based upon satisfactory completion of preceding tasks.

Figure 1



An educational development task involves integrating knowledge in terms of subject matter content to be learned*, including specific skills, with appropriate attitudes and values to meet the institutional-occupational requirements for a specific educational or vocational training program. Growth occurs through mastery of the essential elements of each task and the learner's readiness to move beyond the current task to the next one. The titles for the educational development tasks for adults in postsecondary educational and vocational-technical training are expressed in terms of the "functions to be performed" by the learner. A more detailed definition of Educational Development Task #1 is as follows.

> Making the commitment to return to school - covers the process of formulating the commitment to return to school and integrating and clarifying personal values in terms of knowledge about educational and vocational-technical opportunities for achieving career goals. The task starts at the point of initial consideration of formal preparation as a vehicle for self-development and continues throughout the admissions process up to the point of registering and starting classes.

Educational Development Task #1, therefore, involves the study of adults as they formulate the commitment to return to school. This task begins with the initial consideration of returning to school, continues throughout the admissions process, and concludes with being accepted and starting classes.

The basic question that guided the research and development for task #1 is:

> **What are adults' perceptions of the factors that facilitate and impede them in making a commitment to return to school?**

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*In the case of Educational Development Task #1, subject matter consists of admissions, program, and career information.

The sample studied was selected from the total population of adults that met the following criteria: (1) 20 years of age or older, (2) interrupted educational experience, (3) no prior postsecondary, and (4) enrolled in at least two courses for five credit hours.

Work on task #1 was initiated in September 1981 at two research sites: the Ashland Community College, Ashland, Kentucky (See Appendix A for institutional description); and the Southwest Virginia Community College, Richlands, Virginia (See Appendix B for institutional description). Five additional schools (Hocking and Washington Technical Institutes in Ohio, Wytheville Community College in Virginia, and Parkersburg and Southern West Virginia Community Colleges in West Virginia) were included to form a consortium group to serve in a review and advisory capacity and to be involved in a first level of intervention dissemination. (See Appendix C for detailed information on consortium schools.)

Research and Development Methodology

The R & D process for each task typically involves the following stages: (1) problem investigation; (2) intervention design; (3) pilot test and revision; (4) field test and revision; (5) product finalization; and (6) dissemination to consortium schools, postsecondary institutions in the AEL Region, and nationally as resources permit.

The problem investigation stage covers the following three phases: context analysis, problem identification, and problem specification. The context analysis involved using case study methodology which focused on the analysis of institutional policy and procedures and formal interviews with admissions staff and adults. This included examination of the roles and responsibilities of administrators, student services staff, academic advisors, and admissions and clerical staff in terms of their work with adults during admissions. The study also covered an indepth look at institutional requirements and procedures for admission and the information delivery systems associated with the admissions process.

An example of a context analysis activity is the study of the reading level for admissions documents. This analysis was completed using the Minnesota Educational Computing Consortium microcomputer software package "School Utilities, Volume 2." This program allows up to ten randomly selected 100-word passages from each document to be analyzed and provides the reading level for each and a total reading level for each of five reading tests.

The average reading levels of the documents considered are as follows.

- The college catalogs for both research sites averaged a grade 17 reading level on the five tests.
- The application packet for one site was rated grade 16.5.
- Program information brochures for one site ranged from grades 13-17 with a grade 16 average reading level.
- The admissions letters sent to prospective students for both research sites averaged grade 16.
- The student handbooks for both research sites averaged a grade 17 reading level.

These findings corroborate other findings developed through interviews with adults and, when analyzed, suggest that uncertainty and dependence are fostered as a consequence of providing written admissions information with high reading levels.

These research efforts resulted in the development of a model of the admissions process based upon: a review of professional literature on college admissions; a study of the admissions process at each research site; the research findings on the critical factors that affect adults making the commitment to return to school; and the initial work on identification and development of task #1 interventions. The Admissions Model was developed and refined during each phase of the research process.

The Admissions Model (see Figure 2 on the following page) presents two basic sets of procedures, characterizing both the institutional and individual processes followed during admissions. The institutional procedures content of the Model was defined based upon the institutional case studies, research data, research site staff, and advisory and consortium group review and recommendations. This process also resulted in specifying the individual procedures shown in the lower portion that describe the learning content associated with adults developing the commitment to return to school. This refined conceptualization of the admissions process helped establish an alternative perspective for viewing admissions, one that contrasts with and helps to create greater balance between the institutional requirements for admissions and an individual's learning requirements for developing commitment.

ADMISSIONS PROCESS					MATRICULATION PROCESS
STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	
INSTITUTIONAL PROCEDURES					
Recruitment Process →			Induction Process →		
Contacting Prospective Adult Students Contacting and Attracting Adults: (Through Students, Former Students, Staff, Media, etc.)	**Informing Prospective Adult Students** Providing Information Providing Application Materials Responding to Questions Interviewing Test Administration	**Evaluating Prospective Adult Students** Receiving Application Information: Application Form, Transcripts, Medical Information, Test Results, Interview Data Counseling Receiving Requests for Financial Aid	**Admitting Adult Students** Selecting Assigning Advisor Advising Orienting Placement Testing Interpretation of Academic and Placement Tests	**Registering Adult Students** Starting Records Preparing Class Rosters Receiving Funds Assigning Resources, Staff, Room	**Monitoring Student Progress** Advising Reporting on Exceptions Counseling Tutoring
INDIVIDUAL PROCEDURES					
Commitment Process →					
Responding to Initial Information About Learning Opportunities Receiving Information on School and Programs Offered Responding by Making Written, Phone, or Personal Inquiry Assessing Relevance of General Information General Personal Factors, Self Concept, Prior Learning Experience, Interests, and Goals Personal and Family Circumstances Encouragement From Other Family, Friends, Students, Employer Referral by Education or Community Agency	**Exploring Personal Relevance of Program Options** Learning About Institution and Programs: Location of School, Programs Offered, Admissions Staff, Counselors, Costs, Financial Aid, Transportation Options Exploring Personal Relevance and General Implications of Information: Personal Goals, Family, Work, Health, Personal Crisis, Other Interests and Responsibilities Clarifying Options Regarding Program Graduation Requirements Exploring Implications for Future: Personal Growth, Employment, Career, Income, Standard of Living, Social Involvement	**Deciding to Apply for Program** Understanding Program Requirements and Making Tentative Program Selection Setting Personal and Career Goals Providing Personal Information Seeking Information Seeking Counseling Understanding Institutional Information Planning Finances, Student Loans, Financial Aids Understanding Purpose and use of Academic Tests	**Finalizing Program Selection** Receiving Academic Advising Understanding Course Requirements & Content Developing a Schedule Setting Learning Expectations Setting Time Expectations for Courses, Major, and Graduation Planning Transportation Arranging Finances Understanding Results of Academic and Placement Tests	**Completing Registration** Implementing Decision to Return Getting Schedule Approved Completing Registration Process Paying Fees Organizing Family and Work Responsibility Organizing Self to Participate in Class Organizing Self to Study Implementing Transportation Plans Purchasing Learning Materials	**Subsequent Vocational Development Tasks** VDT #2 → VDT #3 → VDT #4

Research Findings

The problem identification phase for R & D stage 1 involved finalization of the institutional case studies and interviews with adults concerning their admissions experiences. Data collection instruments were initially developed and pilot tested based on interviews with adults during the context analysis and then formally used in the fall of 1983 with a sample of adults at both research sites who made it through the admissions process and registered for classes and with a sample who failed to complete the admissions process. Analysis of these interviews resulted in identification of 101 facilitating factors and 93 impeding factors. (A complete list of the specific facilitating and impeding factors organized by the steps in the Admissions Model is presented in Appendix D.) These factors were then grouped with the assistance of adults, research site staff, and the advisory and consortium group members during the problem specification phase of R & D stage 1 into the basic factor categories that affect adults in formulating a commitment to return to school. These categories are shown on the following page (see Figure 3) in terms of their facilitating and impeding relationships.

Figure 3

Relationship of Categories of Facilitating and Impeding Factors Affecting Adults Making a Commitment to Return to School

Facilitating Factor Categories	Impeding Factor Categories
Employment related motivators	
Financial assistance and improvement	Financial difficulties
Institutional information, services, and offerings	Lack of information and services
Institutional characteristics	Confusion/unfamiliarity with institutional processes
Personal motivators	Apprehensions about self
Encouragement from others	Handling multiple responsibilities
	Time management concerns

Information from the data analysis and interpretation is summarized in Figure 4, on the following page, Influence of Critical Factor Categories During the Admissions Process. The major concepts in this summary are as follows.

The primary source of motivation for adults to become involved in school is career related with specific focus on employment or employment improvement. This motivation includes one, or frequently more than one, of the following reasons. Adults entering school want:

- to improve their employment status;
- to develop or improve specific job skills;
- to become independent and self-supportive;
- to improve their income;
- help with career transition;
- to enhance their prospects for initial employment;

Figure 4

Influence of Critical Factor Categories During Admissions Process

*Type of Influence:

	Facilitating	Impeding
Direct =	XXXX	0000
Moderate =	xxxx	oooo
Slight =	——	----
None =		

	Steps in Admissions Process				
	1				
	Institution: Contacting Prospective Adult Students Adults: Responding to Initial Information About Learning Opportunities	Institution: Informing Prospective Adult Students Adults: Exploring Personal Relevance of Options	Institution: Evaluating Prospective Adult Students Adults: Deciding to Apply for Admission	Institution: Admitting Adult Students Adults: Finalizing Program Selection	Institution: Registering Adult Students Adults: Completing Registration
Employment Motivation					
Employment Improvement	XXXXX	——	XXXXX		
Financial Assistance, Improvement, or Difficulties					
Financially Able or Have Help	xxxxx	——	XXXXX		XXXXX
Financial Difficulties			00000		00000
Institutional Information and Services					
Receiving Information/Services	xxxxx	xxxxx	XXXXX	xxxxx	xxxxx
Lack of Information/Services		00000	00000	00000	00000
Institutional Characteristics and Processes					
Institutional Characteristics		xxxxx	xxxxx		
Institutional Processes		ooooo	ooooo	00000	00000
Personal Motivators and Apprehensions					
Encouragement from Others	XXXXX				
Personal Competence and Better Future	XXXXX		XXXXX		
Apprehension About Self and Learning Ability	00000	00000	00000	00000	00000
Personal Skills - Time Management and Handling Multiple Responsibilities					
Responsibilities	00000	-----			00000
Time Available			-----	-----	00000

- to pursue career or educational goals;
- to engage in career/educational exploration and planning;
- opportunities for personal development; and occasionally
- to avoid boredom, stagnation, etc.

Employment motivation, according to the analysis, was the strongest facilitating influence for adults, particularly at the time of making their initial contact with the school and again when applying for admission. These represent steps 1 and 3 of the Admissions Model.

Figure 4 also shows that adults have more going for them at the start of the admissions process than at the conclusion. The impeding factors initially are more personal in nature; while at the end of the process, although these factors are still present, additional factor categories become important. These additional categories are financial assistance, institutional information and services, and institutional processes.

The strongest facilitating factor at the conclusion of the admissions process was having the finances to pay for tuition and books. The strength of this category is based on the fact that over 40 percent of the adults at each research site during registration were on some form of financial aid. This was a major impeding factor for those adults who qualified but applied for aid too late to receive it before registration.

The impeding factor category, lack of institutional information and services, may actually be one that is amenable to change. For example, very little academic advising of an introductory or orientation nature was provided to help new students understand and evaluate program information, their readiness to learn specific subjects, and to explore the time requirements for class, study, and program completion. Much of the "advising" that did occur was for students applying for the selective admissions programs. In these instances, faculty functioned as "gatekeepers"--screening prospective students for program acceptance. Also, student services staff, who in the majority of cases interviewed prospective adult students at step 3 of the admissions process, tended to function throughout the rest of the process on a request-for-assistance basis only. The high reading levels of institutional information, particularly admissions documents, addressed earlier in this report were also a part of this problem.

With respect to institutional characteristics and processes, many adults were confused and overwhelmed by the admissions process, particularly during registration. They were frequently embarrassed in the presence of others who they felt knew what was expected of them and what to do. Some were also affected negatively by both the apparent impatience of some institutional staff as well as the complexity of the process itself.

The importance of this concern is evident in data collected on adults for the 1983-84 fall admissions process. These data show that of 612 adults who were identified based upon the application materials submitted, only 397 actually registered and started school. This represents a loss of 35 percent of the target population in steps 3-5 of the admissions process and does not account for an unknown number of adults at steps 1 and 2 who were interested but for some reason failed to reach step 3.

Summary and Implications

The following general concepts were identified and summarize the research completed on adults Making the Commitment to Return to School. (See Appendix E for Gen ral Observations and Conclusions for Educational Development Task #1.)

About Adults

Participation in the admissions process is contingent upon an adult being interested enough to initiate contact with an institution to get information about the programs offered and requirements for admission.

Adults, particularly those who are unsure about themselves or what they want, will delay making contact with the school or making application until late in the process and then find themselves, usually during registration, in a situation where they need specialized help and counseling at a time when school staff does not have adequate time to work with them.

Adults will have access to and read information about admissions requirements and procedures, but will not necessarily understand this information or understand it in the way the institution intended.

About the Admissions Process

The admissions process is conceptualized and operated from primarily an institutional point of view. This involves procedures and services designed to ensure that students meet the information requirements for admissions. There is, however, no systematic conceptualization of the admissions process that takes the prospective student, as a learner, into consideration as well as institutional requirements.

The admissions process is generally an aggregate of "successful" activities used and continuously refined or modified based upon informal estimates of their effectiveness. It is basically a pragmatic process open to change or modification based upon perceived need, problems encountered, and options for change that are both available and feasible. Electronic technology offers the prospect of on-line registration at one location as a substitute for people carrying documents from station to station as a means of transferring and recording information.

There are no effective information management procedures to record, monitor, or provide information on the progress of adults at the different stages of the admissions process.

About Learning

The admissions process can be a means for prospective students to learn about:

- The institution, programs, and staff.
- Their personal characteristics and attributes relative to the requirements for entry into the institution and a specific program.
- Their prospects for meeting the requirements and being successful in specialized subject areas or a program.

- Their having the time to complete a course or program in relation to the demands made by other responsibilities.
- Their building the commitment to enter school based upon reliable knowledge about program requirements and confidence in their ability and goals to undertake and successfully complete further education and training.

Conclusion

The admissions process, when conceived as a learning process, can be a means for adults to transform more general interests in education and career enhancement into values and goals necessary in developing the commitment to return to school. Such a commitment, when comprehended and grounded in reliable information, can be stated in practical terms such as an adult applying to a specific school, entering a specific program, and seeking specific outcomes. This involves personal transformation achieved through interactively clarifying knowledge and value to establish goals and develop a plan. A personal plan, as such, integrates knowledge about self, and the institution and programs selected, with a concept of a more desirable future to enable the learner to describe how he/she will be able to reach his/her goal. Learning, when viewed in this manner, illuminates the nature of commitment by structuring and energizing action in the present with reference to one's concept of the future.

This conclusion reduces to the following innovation principle: **Institutions should cultivate the capacity to help adults engage in self planned, directed, and initiated learning throughout all aspects of the admissions process by providing information and services in a manner that will facilitate their learning and developing a commitment to return to school.**

Intervention Process

Intervention is defined as the coordinated action taken by responsible individuals in an institution to influence the adoption of an innovation. To facilitate promotion of this innovation, the final phase of R & D stage 1 focused on the problem specification phase of research which involved identifying the critical impeding and facilitating factors amenable to change. This was accomplished in collaboration with adults, technical consultants, and personnel from the research sites and consortium schools. The critical factors regarded as amenable to change became the basis for selecting 15 areas for intervention. This process covers R & D stages involving the design, development, and validation of intervention resources for task #1. These resource materials are directed to all participants and aspects of the admissions process. Figure 5, on the following page, provides an overview of the interventions for task #1 and the target groups and steps in the admissions process addressed by each. They include the following major products.

The Admissions Process: Administrative Handbook

There were several major aspects of the admissions process that were identified as problem areas. These involved the institution knowing who was in the admissions process and at what step; adult learning with respect to admissions and placement testing and test interpretation; lack of services and resources to promote learning with respect to the career aspects of educational planning; insufficient and/or inappropriate admissions materials; and inadequate time and services provided for adults making an initial contact with the institution. The following resource materials are intended to address these areas of concern.

Figure 5

AEL LLP Interventions for Educational Development Task #1

Intervention Title	Steps in Admissions Process I	II	III	IV	V	Target Group*
Admissions Management Information Tracking System	**********	**********	**********	**********	**********	2
Validation of Placement Tests			**********	**********	**********	3,4
Toll-Free Telephone Access Number	**********	**********				1,2
Information Booth		**********	**********	**********	**********	1,2
Reading Level Analysis of Admissions Documents	**********	**********	**********	**********	**********	2,3,4
Educational Planning Resource Center	**********	**********	**********	**********		1,3,4
Staff Training: Research Findings	**********	**********	**********	**********	**********	2,3,4
Staff Training: Academic Advising/Counseling Staff		**********	**********	**********	**********	2,3,4
Staff Training: Adult Commitment	**********	**********	**********	**********	**********	2,3,4
Staff Training: Educational Planning Resource Center	**********	**********	**********	**********		2,3,4
Staff Training: Admissions Office and Support Staff	**********	**********	**********			5
Sound Slide - Application Process		**********	**********			1,3
Sound Slide - Academic Advisement Process			**********	**********		1,4
Sound Slide - Registration Process					**********	1,5
Educational Planning Course	**********	**********				1

*Target Group Code:
1 = Adults
2 = Administrators
3 = Student Services Staff
4 = Academic Advisors
5 = Office and Clerical Staff

- Admissions Management Information Tracking System (ADMITS). A microcomputer system that tracks prospective students through the admissions process and makes it possible to provide follow-up assistance for those having difficulty.

- Validation of Placement Tests. Provides guidelines for local validation of placement instruments and for the development and use of interpretative materials to help new students understand their academic strengths and weaknesses.

- Toll Free Telephone Access Number. Provides prospective students with a convenient means of responding to recruitment initiatives, asking questions, and talking with institutional representatives.

- Information Booth. Provides prospective students with information and other assistance during periods such as registration so as to free admissions office staff for other tasks.

- Reading Level Analysis of Admissions Documents. Develops procedures for identifying and, when necessary, rewriting admissions documents to reading levels suitable for new students.

- Educational Planning Resource Center. Provides resources for student services staff and academic advisors in helping new students in career exploration and planning and supports the Educational Planning Course.

The Admissions Process: Staff Development Handbook

Five training packages were designed to help staff understand adult concerns and to develop more effective ways of communicating with and helping adults formulate a commitment to return to school. Four training packages are for administrators, faculty, academic advisors, and student services staff involved in admissions. The last is designed for admissions office, secretarial, and clerical staff who have contact and work with new students during the admissions process. The training packages are as follows.

- Research Findings. Introduces research design, findings, analysis, and interpretation and interventions for helping adults.

- Academic Advising and Counseling Staff. Provides staff with an opportunity to examine their roles with respect to helping new students develop commitment.

- Adult Commitment. Provides opportunity for staff to take an indepth look at concept of commitment and at learning as the primary means of fostering it in work with prospective students.

- Educational Planning Resource Center. Provides academic advisors, counselors, and library staff with information and practice in using educational and career resource materials during the admissions process.

- Admissions Office and Support Staff. Helps sensitize support staff to understand the interests, motivations, and apprehensions of adults during the admissions process and the importance of their role in establishing positive and supportive relationships with them at each step of the admissions process.

The Admissions Process: Audiovisual Information Development Guide

Three sound slide programs provide an information delivery system to help adults understand the basic information required for admissions, the nature of program offerings, and special assistance available as part of the admissions process. The three sound slide programs are as follows.

- Application Process. Presents a complete overview of the requirements, forms, and procedures for the application process, including financial aid.

- Academic Advising Process. Presents information regarding program/course selection and the role of the academic advisor.

- Registration Process. Presents basic concepts about credit hours, tuition, and registration forms and procedures.

Educational Planning Course

The Educational Planning Course has been designed as a pre-matriculation experience delivered either as an independent course or through continuing education to assist adults in building self-confidence, exploring their

ability to do well in an educational setting, and organizing their thinking and ideas related to educational and career planning. The target group for the course is adults who are prospective college students and, in particular, those who are in the first three steps of the admissions process. The product is as follows.

- Instructor's Guide and Student Handbooks for Modules A, B, and C. Contains photoready copy for:

  - Module A: Establishing an Occupational Preference.
  - Module B: Developing a Career Plan.
  - Module C: Preparing for Job Hunting.

ALTERNATIVE EXPLANATIONS FOR EDT #1 RESEARCH FINDINGS

Data collection procedures for the study of adults during the admissions process were sensitive to a variety of views regarding adults making the commitment to return to school, particularly those that did not support the theoretical perspective for the study and might, therefore, be more appropriate explanations for the experiences of adults. This information has been organized and evaluated in terms of its plausability for explaining research findings. The alternate explanations address the following etic concepts or lower level inferences made based on the research data.

> The admissions process is conceptualized from primarily an institutional and operational point of view. It is generally an aggregate of "successful" activities used and continuously refined or modified based upon informal estimates of their effectiveness and open to change or modification based upon perceived need, problems encountered, and options for change that are both available and feasible. There is, therefore, no systematic conceptualization of the admissions process that takes the individual as well as the institutional perspective into consideration.

Basically two classes of alternative or competing explanations of the research findings were identified during the study. These explanations consist of: (1) nonopposing partial explanations that focused upon a narrower or more restricted aspect of what later was recognized as a more complete explanation of adult experiences during admissions, and (2) an opposing interpretation based upon a different concept or concepts of adult development and learning. Each of these positions will be explained and discussed.

The Nonopposing Partial Positions

The administrative position. This position is represented by the institutional presidents; deans; division or department heads; and the directors of admissions, special projects, and continuing education. The holders of this position tend to be preoccupied with operations and problems related to the sequence of the yearly institutional cycle.

For example, for admissions they became concerned with recruiting, admitting, and registering students each school term, and, in particular, during the period preceding the fall term when the majority of new students start school. The nature of their involvement depends upon their specific responsibility but it generally involves planning and decisionmaking with regard to implementing, monitoring, and reviewing program operations.

An important factor that contributes to these individuals having a partial nonopposing position is that they appear to develop deeper and deeper involvement in the management aspects of institutional operations and gradually become more insulated from direct contact with students through having delegated this responsibility to subordinates. The administrators, with the exception of a dean of students, were not directly involved with prospective adult students apart from special problems, or an occasions when no one else was available to work with them and referrals were generally made.

Evaluation of this position confirms it as a partial nonopposing position for the following reason. Administrators participated in the decision to participate as a research site and were involved in all of the major steps of the study. They served as members of their respective institutional advisory group and the consortium group. They also participated in the

Intervention Planning Meeting in reviewing research findings and selecting interventions, as well as making provision for staff, facilities, and equipment for the pilot and field tests of the interventions.

The partial nonopposing position of the administrator groups actually modified and expanded as the study went on to accept the project research findings and interpretation.

Closely associated with this position is that of the clerical and support staff at both research sites. This includes admissions, student services, and administrative office staff who work with adults during the admissions process. They were, although not to the same extent as the administrators, preoccupated with the operational and procedural aspects of the admissions process at the start of the study, but at the end unanimously adopted the project interpretation of the research findings.*

The clinical perspective. The second nonopposing partial position is represented by a student services or counseling staff and a limited number of faculty. Student services staff play a very important role in working with prospective students during the admissions process. The objective of student services during the admissions period is to provide prospective students with information, respond to specific questions they may have, and to provide specialized help to resolve personal or academic problems affecting admissions. Student services staff interview most prospective students either during or after their application for school. These staff

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*Validation Report for the Staff Training Package on Admissions Office and Support Staff, LLP EDT #1, January 1985.

are also available for additional help as needed. They frequently provide academic advising for students because of the unavailability of advisors prior to the actual starting of school.

The student services staff tend to view admissions as a decisionmaking process and aim at assisting prospective students in making decisions regarding their application for admissions and the selection of a major. These services, however, tend to be more reactive than proactive. That is, other than the "required" interview which most adults have, there are no additional organized or planned contacts with students until registration. Further assistance is on an as-needed-basis only, with the exception of students who apply for financial aid. These students may meet with the student services staff responsible for financial aid once or possibly twice prior to registration.

Two examples of this will help establish this as a partial nonopposing position. Student services staff, at the start of the study, did not view admissions as a learning process. This was evident in observations of counseling interviews. The first example comes from an observed interview in which a student services counselor discussed, among other things, the ACT test results with a prospective adult student. The discussion involved the counselor telling the adult about the test, and what the scores meant. No opportunity was provided for the adult to recall the nature of the test; to personally verify the validity of her test experiences or the accuracy of her test scores; or to understand the reasoning behind the counselor's interpretation. The adult received "conclusions" which were in all likelihood accurate, but not the supporting rationale which would have enabled

her to reconstruct the counselor's thinking at a later time and personally justify the counselor's interpretation or recommendations. The opportunity for teaching and the counselee learning very personal and relevant information was missed. In this regard, the counselor appeared to function more as an expeditor or dispatcher than as a mentor.

Another very important aspect of the interview process involves the language used by the counselors. The language and concepts had far more explicit meaning in the context of the institutional framework and processes than in the mind of the prospective student. Terms such as admissions, application form, transcript, program of study, credit hour, ACT scores, aptitude, achievement, developmental courses, registration, etc., and the names of people and locations on campus all had more generalized or far less clear meaning for the prospective student. The interviews were, as a rule, more procedurally than substantively informative. Students who were interviewed for selective admissions programs tended to be coached on how to present themselves in upcoming departmental interviews. Time was also a factor. After the required information was covered, the counselor typically asked the counselee if he/she had any questions to which the counselee usually responded no or that he/she was not sure.

A second example that shows student services staff, who are by training the resident experts on testing and test interpretation, had at one research site relinquished responsibility for maintaining professional standards to faculty for test validity, reliability, and interpretation. Selected faculty were using a locally developed math test of questionable validity and the Nelson-Denny reading test for the placement of new students into English and

math courses. The Nelson-Denny did have national norms but there were no local validities to support recommendations for the placement of new students in specific English courses.

These tests were administered to new students the morning of the day of registration as part of an orientation program, scored over lunch, and then given to the academic advisors by 1:00 p.m. to use with new students for registration. The advising program was set up in the school library and all new students were to report to their advisor after lunch to select courses, and fill out and have their registration cards signed. Each advisor was stationed at a library table with a name sign on the table and a stack of advisee folders. Frequently, this was the first time many of the students had met with his/her advisor. The advising usually occured within the space of 5-10 minutes. This included the interpretation of the test results, selecting courses, and filling out and approving the schedule. While an advising session was taking place, there were usually several persons in line who were also waiting to talk to the advisor. There was little or no opportunity for students to discuss the meaning of the test data, or explore the personal implications of various course selections. The recommendations made by advisors were derived primarily from the student's applicaton, transcript, test data, and a few confirming questions. The advisors appeared to function as gatekeepers and expeditors. Advisors also used language and concepts with institutional meanings that were far more explicit than the resulting understanding of adults.

From the point of view of both counselors and advisors, it was felt that the important information was being covered during advising and that

prospective students were receiving the help that was required for them to make a decision.

Based upon this, it was determined that student services staff and advisors did not regard admissions as a learning process. This position has been characterized as the clinical position because of its preoccupation with meeting the decisionmaking needs of prospective students over promoting their growth and learning.

Representatives of student services, as well as faculty, participated in project research through membership on advisory committees, participation in the intervention planning meeting, and field testing of interventions. As a consequence of this involvement, the staff referred to here and who were associated with this nonopposing partial position came to support the research project interpretation of the admissions process. A limited number of counselors who were not directly involved in the research also appear to be supportive of the findings, but because they tend to play a more active than contemplative role within the institution, they may not register a final opinion until the implications of the research affects them directly.

The True Opposing Explanation

This position is held by a minority of institutional faculty and did not include student services, clerical or administrative staff, with the exception of one department head. The basic tenets of this position are as follows.

- Admissions is a procedural process that involves students being admitted to school, enrolled in a major, and registered for classes.

- Prospective students need information, counseling, and advice on what they should take in school.
- The admissions process should permit only qualified students to enter school.
- Students should be tested and placed in appropriate classes.
- Learning does not occur until a student starts classes.

This view appears to be strengthened by two very different sets of conditions: (1) the precedent set by the selective admissions program in the health areas that results in the ranking of all applicants for certain programs based on their prior academic performance and admissions test data, and then selecting and admitting only those who are the most qualified; and (2) by the experiences of some instructors who tend to get many of what they regard as "unqualified" students. These students are found mostly in technical programs. They tend to have poorer academic backgrounds and frequently are deficient in both reading and math skills. They also have difficulty in keeping up with their work and the rest of the class.

The general nature of this position is best seen in faculty and staff responses to an evaluation instrument administered at one research site* following a workshop on the project research findings. The question that was asked is:

> Do you accept the concept of admissions being a learning process for adults essential to their developing a commitment to return to school? Why or why not?

A summary of the responses is as follows.

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*Validation Report, Staff Training Package on Research Findings, LLP EDT #1, January 1985.

Analysis indicates that there was very strong agreement, 75 percent among faculty and staff, with the concept of admissions being a learning process for adults. There were, however, some exceptions to this; 17 percent of the school staff felt that admissions was not a learning process while eight percent or three staff members did not respond, and two others were nonresponsive to the question.

Those who felt that admissions was not a learning process were primarily from the technology and nursing divisions. One person considered the admissions process as a "necessary evil" and that a "true" commitment to return to school will occur in the classroom. Another stated that the admissions process was "a means to an end." One other felt that making admissions a learning process would make it harder, while another felt it would cause more stress. Two felt it was already a routine or bureaucratic process and should not be made more difficult. Two others actually agreed with the concept, one of whom stipulated that it is not a learning process "at the present time." In all, five of the 11 technology division staff members and three members or one-third of the nursing staff did not accept the concept. This suggests that they may hold fundamentally different views of adult learning and/or the admissions process.

In the other divisions, one person in science and mathematics stated that "I don't know" and one from humanities and social sciences indicated tht he/she did not understand the question. The counselors and business division staff unanimously accepted the concept of admissions being a learning process while the majority of the administrators, science and math, and humanities staff members also agreed with the concept.

As can be seen in the above comments, faculty who rejected admissions as a learning process were not in agreement among themselves. Further, in response to other evaluation questions, 81.3 percent of the group said that they agreed with the research findings and 89.8 percent were able to select areas for intervention that they felt held the greatest promise for assisting adults in successfully formulating the commitment to return to school.

It is difficult to refute the basic tenets of this position to the degree the respondents who reject the research findings represent the essentialist viewpoint or a legitimate philosophical position in education. It is only possible to recognize: (1) the lack of consistency among adherents, and (2) that it is definitely a minority competing view for an explanation for the experience of adults during the admissions process.

The remaining question to be addressed on alternative explanations for the findings of EDT #1 involves the scope of the educational development task. The original conceptualization stipulated that EDT #1 starts at the point of initial consideration of formal education or vocational-technical training as a vehicle for self improvement and continues throughout the admissions process up to the time of initial registration and starting of classes. Subsequent study led to a more detailed definition of the task through the development of the Admissions Model. It designates five steps that involve parallel sets of institutional and individual admissions procedures. There were no instances during the study of EDT #1 that raised the possibility of different views or interpretations of the scope of the task. This includes fieldwork at both research sites and the comments and reactions of administrators, admissions and student services staff, faculty, consortium group representatives, and project consultants.

Data, however, is stronger for establishing the validity of steps #3-#5 of the admissions process than for steps #1 and #2. This is due to the limited resources available and the corresponding limitation on being able to study adults in steps #1 and #2. This would have required a general sampling of adults within the multi-county service areas of the respective research sites to determine their educational interests and action that they had taken with regard to returning to school. Consequently, there was no data available on adults for step #1 of the admissions process, and very little systematic data on adults for step 2. Both research sites, at the time of the study, did not keep records on who requested or received admissions or program information. By contrast, however, complete data was collected and used on adults for steps #3-#5 of the admissions process.

It is therefore important to recognize that: (1) there were no competing views or alternative explanations of the research findings on the scope of EDT #1; (2) although there is little supporting evidence for steps #1 and #2 individual procedures of the admissions model, the institutional procedures section is accurate based upon data collected during the context analysis and problem investigation phases of the study; and (3) the content for steps #1 and #2 individual procedures is consistent with the overall educational development task conceptualization and nature of EDT #1. It therefore seems appropriate to accept EDT #1 as a reasonable explanation of admissions as a learning process for adults in their making a commitment to return to school.

APPENDICES

Appendix A
Ashland Community College Research Site Description

Ashland Community College
1400 College Drive
Ashland, Kentucky 41101

Ashland Community College (ACC) is located in the City of Ashland, Boyd County, which is in the northeastern tip of the State of Kentucky. Situated on the Ohio River, Ashland is approximately 70 miles west of Charleston, West Virginia, and is primarily accessible by U.S. 60/U.S. 23, U.S. 60 and S.R. 3. ACC's service region includes the counties of Boyd, Greenup, Carter, Lawrence, and Elliott. This region includes an area of approximately 1,571 square miles and a population of approximately 122,077 (based on the 1970 Census). The primary industries are petroleum, chemical, and health services.

ACC is part of the University of Kentucky Community College System (UKCCS). This system includes 12 community colleges and one technical institute. ACC had been operational since 1938, as Ashland Junior College, in facilities furnished by the Ashland Public School System. In 1957, the junior college merged with the University of Kentucky (UK) and became a University Center providing the first two years of a baccalaureate curriculum as well as programs designed to meet community needs. Then, in 1964, the Center become part of the UK Community College System and was officially designated Ashland Community College. (ACC Self Study, 1980).

The Community College is headed by a Vice President who is directly responsible to the President of the University of Kentucky. A director is responsible for general administration of each college. Since 1961, Dr. Robert Goodpaster has been Director of Ashland Community College. Dr. William Vice serves as Dean of Instruction and Mr. Carl Lively is the Assistant Director for Student Development. ACC moved to its present site in 1970, occupying the first of ten planned buildings.

ACC operates year round with a Spring semester from mid-January to mid-May, a summer intersession from mid-May to early June, a summer session from early June to early August, and a Fall semester from late August to mid-December.

The campus of ACC is situated on a 47 acre tract of land in the Avondale section at 134th Street and Oakview Road. The campus is ten blocks from downtown Ashland. The college is housed in a modern, broken-L shaped building of approximately 149,000 square feet. One section of the L shaped building has four floors, the basement being the first floor. The second section has five floors, the first floor also being the basement. There are 31 classrooms, 18 laboratories, 3 darkrooms, 75 offices, a bookstore, vending machine room, faculty lounge, three small lounges, a student lounge, and storage facilities.

In addition to campus facilities, through mutual agreements with agencies and educational institutions in the area, the college offers a number of courses in area facilities. One of the noteworthy endeavors is the special program offered at the Federal Correctional Institution. Since the early 1960's, the college's teachers have taught courses at FCI, thereby enabling the institutional population to pursue their academic plans on a regular basis. As a result, many inmates at the Federal Correctional Institution have completed associate degree programs at the college. (ACC Self Study, 1980)

ACC offers three Associate Degrees as well as several nondegree, noncertificated programs. The following are the Associate of Arts and Associate of Science Programs: Agriculture, Arts and Sciences, Business and Economics, Education, Engineering, and Home Economics. Other programs include: Architecture, Law Enforcement, Nursing, Medical Technology, Physical Therapy. The Associate of Applied Science Programs include the following majors: Accounting Tech., Adm. Medical Assistant, Management Tech. - Bus., Civil Eng. Tech., Communications Tech., Social Services, Nursing Associate, Prof. Secretaryship, Real Estate, recreation Leadership, Nursing Awaiting, Undecided Associate, Major Not Listed, Forest & Wood Tech., Management Tech. Bank. ACC does not offer certificate programs. However, a variety of adult and continuing education programs are offered and include both credit and noncredit courses.

During the three years LLP research was conducted at ACC, the full time equivalent student count was as follows:

1981 -- 1,796 1982 -- 1,879 1983 -- 2,287

As of Fall September 1981, there were 54 full time faculty employed at ACC. Eighteen percent of the full time faculty have attained doctoral degrees, 20 percent have education beyond the master's degree level, 52 percent have attained masters degrees, one percent have education beyond the baccalaureate level, and 5 percent have attained baccalaureate degrees. Fifty-five percent are male and 44 percent female.

The official faculty teaching workload, according to the Faculty and Staff Information Bulletin, Community College System 1972, is fifteen credit hours. Faculty members are also expected to:

> devote an agreed upon (between faculty member division chairman and community college director) percentage of time to such activities as student guidance, advisory activities, community service as related to the college program, professional activities, educational leadership, and service. (ACC Self Study, 1980)

Appendix B
Southwest Virginia Community College Research Site Description

Southwest Virginia Community College
Richlands, Virginia 24641

Southwest Virginia Community College (SVCC) is located in Richlands, Virginia, on 100 acres in the County of Tazewell. It is situated in a very rural, mountainous, picturesque setting and is primarily accessible by U.S. Routes 19/460. The region includes an area of approximately 1,600 square miles and a population of approximately 101,000 people. The primary industries are coal mining, banking, and real estate. SVCC serves primarily the residents of the counties of Buchanan, Dickenson, Tazewell, and part of Russell. Studies indicated that SVCC serves a severely isolated area that has the lowest level of adult educational attainment in Virginia and has the third highest drop-out rate in the state. Further, only 35 percent of the high school graduates continue their education beyond high school, while the statewide average is 59 percent.

Southwest Virginia Community College was established in 1967 as a two-year institution of higher education, as part of a state-wide system of community colleges. The Virginia Community College System includes 23 community colleges with 33 campuses. The college operates under policies set forth by the Virginia State Board for Community Colleges and the local College Board. Funding is primarily from state funds with additional support from the local participating communities. SVCC was officially accredited by the Southern Association of Colleges and Schools in 1970 and was reaffirmed for ten years in 1974 (SVCC College Catalog, 1981).

At the time the college was named by the local College Board in 1967, Dr. Charles King was appointed as the President, and he has served in that capacity to this date. Dr. Harold VanHook serves as Dean of Instruction and Dr. Armand Opitz is Dean of Student Services.

SVCC facilities are housed in four buildings: Buchanan Hall which has 37,400 square feet of space, Russell Hall which has 41,261 square feet of space, Tazewell Hall which has 40,000 square feet of space, and Dickenson Hall which has 4,320 square feet of space with a grand total of 120,000 square feet. The master plan for the college includes the addition of several more buildings, providing a functional institution in pleasant surroundings. It operates on the quarter system and is open on a year-round basis. Classes normally are held from 8:30 A.M. through 9:30 P.M.

Southwest Virginia Community College is a comprehensive institution of higher education offering the following programs:

1. Occupational-Technical Education. Programs in this area are designed to meet the increasing demand for technicians, semi-professional workers, and skilled craftsmen for employment in industry, business, the professions, and government. The curricula are planned primarily to meet the needs for workers in the region being served by the college.

2. University Parallel-College Transfer Education. Programs in this area include college freshman and sophomore courses in arts and sciences and preprofessional education at standards acceptable for transfer to baccalaureate-degree programs in four-year colleges and universities.

3. General Education. The programs in general education encompass the common knowledge, skills, and attitudes required to enable the student to be effective as a person, a worker, a consumer, and a citizen.

4. Continuing Adult Education. These programs, offered to enable adults in the region to continue their learning experiences, include both degree credit and nondegree credit study offered during the day and evening hours.

5. Special Training Programs. Special training is provided where special job opportunities are available for new or expanding industries. This special training shall be coordinated with Virginia's economic expansion efforts and with the needs of employers.

6. Developmental Courses. These courses are offered to help prepare individuals for admission to an occupational-technical curriculum or to a university parallel-college transfer curriculum in the college. These programs are designed to help the individual develop the basic skill and understanding necessary to succeed in other community college programs.

7. Specialized Regional and Community Services. The facilities and personnel of the college are available to provide specialized services to help meet the cultural and educational needs of the region served by the community college. This service includes non-classroom and non-credit programs, cultural events, workshops, meetings, lectures, conferences, seminars, and special community projects.

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During the three years LLP research was conducted at SVCC, the full time equivalent student count was as follows:

1981 -- 1,812 1982 -- 1,622 1983 -- 1,822

There are 85 persons comprising the faculty and administration of SVCC. Fifty-nine of these staff are male and 26 are female. The majority (63%) of the faculty have at least a masters, but less than doctoral degree. Fifteen percent have a doctoral degree, 14% have a baccalaureate degree, and 7% have less than baccalaureate degree. The majority of the faculty received their highest degree from Virginia (30%), and the adjacent states of Tennessee (12%) and North Carolina (16%).

The responsibilities of the teaching faculty are defined in the Faculty Handbook (1982):

> The primary responsibility of a member of the teaching faculty in the Virginia Community College System should be to provide quality instruction for the students. The major emphasis shall be on good teaching by working with students in classrooms, laboratories, individual conferences, and related activities--to help the student develop his interests and abilities to his fullest capacity in order to become a better person, a better worker, and a better citizen.

Appendix C

Lifelong Learning Program Consortium Schools

Lifelong Learning Program Consortium Schools

Dr. John L. Light, President
Hocking Technical College
Nelsonville, Ohio 45764
614/753-3591

Dr. Eldon Miller, President
Parkersburg Community College
Parkersburg, West Virginia 26101
304/424-8000

Dr. Gregory D. Adkins, President
Southern West Virginia Community College
Williamson, West Virginia 25661
304/752-5900

Dr. Carson Miller, President
Washington Technical College
Marietta, Ohio 45740
614/374-8716

Dr. William F. Snyder, President
Wytheville Community College
Wytheville, Virginia 24382
703/228-5541

Appendix D:

Listing of Critical Factors Affecting Adults in Making a Commitment to Return to School Organized by the Factor Categories and the Five Steps of the Admissions Model

LISTING OF CRITICAL FACTORS* AFFECTING ADULTS IN MAKING A COMMITMENT TO RETURN TO SCHOOL ORGANIZED BY THE FACTOR CATEGORIES AND THE FIVE STEPS OF THE ADMISSIONS MODEL

Step #1 Admissions Process

Institutional Initiatives: Contacting Prospective Adult Students

- Contacting and Attracting Adults (through students, former students, staff, media, etc.)

Individual Initiatives: Responding to Initial Information About Learning Opportunities

- Receiving Information on School and Programs Offered
- Responding by Making Written, Phone, or Personal Inquiry
- Assessing Relevance of General Information
- General Personal Factors, Self Concept, Prior Learning Experience, Interests and Goals
- Personal and Family Circumstances
- Encouragement from Other Family, Friends, Students, Employer
- Referral by Education or Community Agency

Facilitating Factors

Financial assistance and improvement

24. Become financially independent
67. Veteran's benefits running out
87. Receiving unemployment funds

Institutional information, services, and opportunities

40. Newspaper releases about school and offerings
78. Vocational rehabilitation services

Encouragement from others

7. Immediate family encouragement
28. Friends attending or that attended school
34. Relatives attending or that attended school
51. Encouragement from students currently enrolled
55. Encounters with current or prior students
56. Age of children

Employment improvement

11. Desire for better life
12. Become employed
14. Desire for future job security
17. Get a better job
19. Have a better future
21. Currently laid off or unemployed
25. Encouragement from employer or work mates
30. Increase income
33. Find satisfying employment
38. Past work experience getting nowhere
41. Facilitate career change
47. Enter a specific occupation
57. Contribute to family support
59. Current job
69. Desire to be a professional
82. Get off welfare

Personal competence and better future

15. Personal improvement
16. Personal determination
23. Desire to succeed
26. Own motivation
29. Further education
37. Improve self-image
44. Have something meaningful to do
45. Doing something for self
49. Get a degree
64. The "right time" to return
68. Knowing what s/he wants out of life
70. Being more mature
75. Positive attitude toward life
83. Be able to do something well
89. Curiosity
95. Set example for children

Not related to 16 most critical factors

90. High school counseling services
91. Good comprehension
94. Community mental health counseling services
100. Had many of the courses in high school

Impeding Factors

Apprehension about self and learning ability

2. Low self confidence
7. Work schedule
8. Self doubts
15. Being out of school so long
25. Age
32. Having done poorly in high school
40. Afraid of having forgotten so much
44. Not being ready to return to school
55. Difficulty concentrating
74. Lazy

Handling multiple responsibilities

16. Caring for family
24. Having young children
52. Nature of work responsibility
64. Taking care of parent or sick children
76. Having teenage children
79. Having a child with learning disability
85. Recreational interests and activities

Time management

45. Stress from work

Not related to 15 most critical factors

54. Distance of home to school
81. Low energy
86. Phlebitis
88. Back injury
89. Gall bladder surgery

*The 101 facilitating and 93 impeding factors are listed in terms of their criticality rating. This index was developed based upon advisory group ratings of the importance of each factor.

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Step #2 Admissions Process

Institutional Initiatives: Informing Prospective Adult Students

- Providing Information
- Providing Application Materials
- Responding to Questions
- Interviewing

Individual Initiatives: Exploring Personal Relevance of Options

- Learning About Institutions and Programs (Location of school, Programs Offered, Admissions Staff, Counselors, Costs, Financial Aid, Transportation Options)
- Exploring Personal Relevance and General Implications of Information (Personal Goals, Family, Work, Health, Personal Crisis, Other Interests and Responsibilities)
- Clarifying Options Regarding Program Graduation Requirements
- Exploring Implications for Future (Personal Growth, Employment, Career, Income, Standard of Living, Social Involvement)

Facilitating Factors

Financial assistance and improvement

87. Receiving unemployment funds

Institutional information, services, and opportunities

22. Admissions staff
61. College catalog

Institutional characteristics

88. Size of school
97. Attractiveness of building

Employment improvement

92. Past training

Personal competence and better future

65. Rebuild basic skills
73. The challenge
76. Intellectual ability
80. Success in getting GED
96. Ability to get along with people

Not related to 16 most critical factors

86. Good study habits

Impeding Factors

Apprehension about self and learning ability

2. Low self confidence
3. Not knowing what to expect
13. Doubt ability to do classwork
27. Afraid to compete with younger students
31. Afraid of not being accepted by younger students
51. Being able to do homework
63. Getting the brain working again

Confusion/unfamiliarity with institutional process

33. Unfamiliar with buildings, room, staff, and procedures
92. Initial greeting by faculty and staff (1)

Handling multiple responsibilities

9. Spouse's opposition or lack of support

Lack of information and services

41. Indifference of staff
62. Insufficient supply of college catalogs
90. Personal one to one contact

Not related to 15 most critical factors

35. Transportation

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Step #3 Admissions Process

Institutional Initiatives: Evaluating Prospective Adult Students

- Receiving Application Information (Application Form, Transcripts, Medical Information, Test Results, Interview Data)
- Counseling
- Receiving Requests for Financial Aid

Individual Initiatives: Deciding to Apply for Program

- Understanding Program Requirements and Making Tentative Program Selection
- Setting Personal and Career Goals
- Providing Personal Information
- Seeking Information
- Seeking Counseling
- Understanding Institutional Information
- Planning Finances, Student Loans, Financial Aids

Facilitating Factors

Financial assistance and improvement

1. Lower aid programs
2. Lower education costs
9. Financial aid counseling services
36. Adequate personal or family finances
50. Employer financial assistance
58. Family financial support
81. Displaced homemaker program
85. Having a loan

Institutional information, services, and opportunities

3. School's counseling services
4. Programs offered
13. Admissions information
18. Program information
20. Information about school and programs
27. Knowledge about school and programs
32. Instructors
39. Atmosphere of school
42. Transfer program to four year institution
46. School's reputation
63. Tutoring services
66. Remedial/developmental courses
71. Accreditation

Institutional characteristics

5. Location of school
43. Availability of transportation

Employment improvement

8. Improve job knowledge or skills
10. Promotion or advancement
52. Opportunities for career exploration
53. Have sufficient income
60. Interest in special field of work
72. Employment experiences in field of interest
77. Start own business
84. Occupational knowledge

Personal competence and better future

54. Work on goal
74. Opportunities for social involvement
79. Intellectual stimulation

Not related to 16 most critical factors

93. More freedom than in high school
98. Pretty women
99. God's will
101. Had many of the courses in high school

Impeding Factors

Financial difficulties

1. Finances
11. Limited personal/family income
59. Becoming unemployed and losing income

Apprehension about self and learning ability

18. Being undecided about personal and program goals
42. Getting back into the routine of school
47. Forgot how to study
53. Feeling of having done poorly on admissions test
57. Afraid of not being accepted into desired program
66. Forcing self to learn again

Confusion/unfamiliarity with institutional process

3. Not knowing what to expect
5. Not knowing where to go for help

Time management

49. Time required to complete program on part-time basis

Lack of information and services

21. Lack of career plan
29. Not having talked to anyone
39. Having to take admissions examinations
90. Personal one to one contact 9L)

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Step #4 Admissions Process

Institutional Initiatives: Admitting Adult Students

- Selecting
- Assigning Advisor
- Advising
- Orienting

Individual Initiatives: Finalizing Program Selection

- Receiving Academic Advising
- Understanding Learning Requirements
- Developing a Schedule
- Setting Learning Expectations
- Setting Time Expectations
- Planning Transportation

Facilitating Factors

Institutional information, services, and opportunities

6. Academic Advising
62. Orientation program

Impeding Factors

Apprehension about self and learning ability

18. Being undecided about personal and program goals
22. Fear of not being able to "keep up"
34. Anxiety over being capable of doing the work
57. Afraid of not being accepted into desired program
67. Not being able to directly enter nursing program

Confusion/unfamiliarity with institutional process

3. Not knowing what to expect
5. Not knowing where to go for help
19. Access to information on programs
33. Unfamiliar with buildings, room, staff, and procedures
38. Access to school staff for information
48. Program requirements different than expected
84. Pessimism projected in nursing orientation
92. Initial greeting by faculty and staff (L)

Time management

58. Being able to complete program in 2 years

Lack of information and services

23. Finding and meeting advisors
30. Not having counseling
36. Insufficient time for counseling
41. Indifference of staff
50. Receiving conflicting information from advisors
65. Inappropriateness of orientation programs
90. Personal one to one contact (L)

Not related to 15 most critical factors

37. Math skills
56. English composition
71. Having additional classes recommended
93. Typing skills

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Step #5 Admissions Process

Institutional Initiatives: Registering Adult Students

- Starting Records
- Preparing Class Rosters
- Receiving Funds
- Assigning Resources, Staff, Room

Individual Initiatives: Completing Registration

- Implementing Decision to Return
- Completing Registration Process
- Getting a Schedule
- Paying Fees
- Organizing Family and Work Responsibility
- Organizing Self to Participate in Class
- Organizing Self to Study
- Implementing Transportation Plans
- Purchasing Learning Materials

Facilitating Factors

Institutional information, services, and opportunities

22. Admissions staff
31. Instructor assistance
35. Registration process
48. Extra help from instructors

Impeding Factors

Financial difficulties

1. Finances
14. Not getting financial aid
28. Time required to secure financial aid

Apprehension about self and learning ability

60. Scared during registration
68. Shock of going to school full time
70. "Others seem to know what is going on"
73. Attitude and immaturity of younger students

Confusion/unfamiliarity with institutional process

3. Not knowing what to expect
5. Not knowing where to go for help
10. Becoming confused during registration
20. Getting the "run around" during registration
26. Registration process long and complicated
33. Unfamiliar with buildings, room, staff, and procedures
43. Access to counselors during registration

Handling multiple responsibilities

4. Scheduling classes around personal responsibilities
6. Time to do everything
7. Work schedule
12. Family conflict
17. Finding/keeping a babysitter
46. Finding adequate study time
75. Doing housework chores
83. Religious interests and activities
85. Recreational interests and activities

Time management

6. Time to do everything
7. Work schedule
80. Finding a place to study

Lack of information and services

5. Not knowing where to go for help
10. Becoming confused during registration
38. Insufficient time for counseling
41. Indifference of staff
61. Disinterest in prerequisite courses

Not related to 15 most critical factors by at least

35. Transportation
69. Parking at school #1
82. Social interests and activities
87. Walk up and down hill at school #2

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Appendix E:

General Observations and Conclusions
for Educational Development Task #1

GENERAL OBSERVATIONS AND CONCLUSIONS

Educational Development Task #1:
Adults Making the Commitment to Return to School

The following general concepts were identified and serve as a summary of the research completed on task #1.

About Adults

1. Participation in the admissions process is contingent upon an adult being interested enough to initiate contact with an institution to get information about the programs offered and requirements for admission.

2. Motivation to become involved in a program includes one or more of the following reasons. Adults entering school want:

   - to develop or improve specific job skills;
   - to improve employment status;
   - to become independent and self-supportive;
   - to improve their income;
   - help in career transition;
   - to enhance prospects for initial employment;
   - to pursue career or educational goals;
   - to engage in career/educational exploration and planning;
   - an opportunity for personal development; and
   - to avoid boredom, stagnation, etc.

About the Admissions Process

3. Adults, particularly those who are unsure about what they want, will delay making contact with the school or making application until late in the process and then find themselves, usually during registration, in a situation where they need specialized help and counseling at a time when school staff does not have adequate time to talk with them.

4. Adults will have access to and read information about admissions requirements and procedures, but will not necessarily understand this information or understand it in the way the institution intended.

5. The admissions process is conceptualized and operated from primarily an institutional point of view.

6. There is no systematic conceptualization of the admissions process that takes the individual as well as the institutional perspective into consideration.

7. The admissions process is generally an aggregate of "successful" activities used and continuously refined or modified based upon informal estimates of their effectiveness. The admissions process is basically a pragmatic process open to change or modification based upon perceived need, problems encountered, and options for change that are both available and feasible.

8. There are no effective information management procedures to record and/or monitor the progress of adults in different stages of the admissions process.

About Learning

9. The admissions process can be a means for prospective students to learn about:

   - their personal characteristics and attributes relative to the requirements for entry into the institution and a specific program;
   - their prospects for meeting the requirements and being successful in specialized subject areas;
   - their having the time needed to complete a course or program in the context of personal, family, and work responsibilities; and
   - their building the commitment to enter school based upon reliable knowledge about program requirements and confidence in their goals and ability to successfully undertake and complete further education and training.

10. The admissions process, when conceived as a learning process, can be a means for adults to transform more general interests in education and career enhancement into values and goals necessary in developing the commitment to return to school. Such a commitment, when comprehended and grounded in reliable information, can be stated in programmatic terms (i.e., an adult applying to a specific school, entering a specific program, and seeking specific outcomes). This involves personal transformation achieved through the interactive clarifying of knowledge and value to establish goals and develop a plan. A personal plan, as such, integrates knowledge about self, and the institution and programs selected, with a concept of a more desirable future to enable the learner to describe how he/she will be able to reach his/her goal. Learning, when viewed in this manner, illuminates the nature of commitment by structuring and energizing action in the present with reference to the future.

V. EDUCATIONAL DEVELOPMENT TASK #2
ADULTS MANAGING LEARNING
RESEARCH SUMMARY

Introduction

The research on Adults Managing Learning was conducted at the two sites used for the study of EDT #1. Qualitative research methodology was used during the 1982-84 fall school terms to determine the factors that facilitate and/or impede adults in managing learning. Adult students were observed in classroom learning situations, interviewed, and asked to complete daily activity logs. The data from each of these three sources were triangulated to identify the critical facilitating and impeding factors affecting their success in managing learning. Results support the view that institutional policy and practice involving governance, curriculum, and teaching operate apart from clear assumptions about learning or consistent understanding of the learning process. These findings were used to identify and design interventions to enhance facilitating factors and/or moderate the effect of the impeding factors affecting adults in developing the ability to manage learning.

Theoretical Perspective

Adult development is defined in terms of Educational Development Tasks that describe the requirements adults must meet to be successful in entering and completing educational and vocational-technical training programs. A more detailed definition of Educational Development Task #2 is as follows.

> Managing learning deals with the total experience of the adult learner and involves restructuring his or her personal, family, home, social, and work life by redistributing personal time, energy, and financial resources in such a way as to meet the essential requirements of each of these domains as well as the requirements for success in school. An educational development task involves the action and interaction of

both personal and institutional variables. For the learner, this means

integrating subject matter content, including specific skills, with appropriate attitudes and values to meet the institutionally defined requirements for success in a specific educational or vocational program. Growth occurs through success in completing the requirements for each task and the learner's readiness to move beyond the current task to the next one.

Research and Development Methodology

The basic question that guided the research and development for Educational Development Task #2 is:

> **What are adults' perceptions of the factors that facilitate and impede them in developing the ability to manage their own learning?**

The sample studied was selected from the total population of adults that met the following criteria: (1) 20 years of age or older, (2) interrupted educational experience, (3) no prior postsecondary, and (4) enrolled in at least two courses for five credit hours.

The R & D process involves the following stages: (1) problem investigation; (2) intervention design; (3) pilot test and revision; (4) field test and revision; (5) product finalization; and (6) product dissemination to consortium schools, postsecondary institutions in the AEL Region, and nationally as resources permit. This report will cover the problem investigation and intervention design stages of the research and development.

The problem investigation stage involved the use of qualitative research methodology and covered the following three phases: context analysis, problem identification, and problem specification. The context analysis was conducted August - November of 1982 and involved the use of

case study methodology to study institutional policy and procedures through informal interviews with administrators, instructional staff, and adult students. This included examination of the roles and responsibilities of administrators, faculty, academic advisors, student services staff, and clerical staff in terms of their work with adults during their first term in school. This analysis also covered an in-depth look at institutional requirements, procedures for registration changes (drop and add and withdrawal), academic advising, instruction, classroom management, course syllabi, instructional materials, assignments, testing, and grading.

The problem investigation phase of the research involved the development and validation of data collection forms, instruments, and procedures. The data sources developed for the study during the context analysis include: institutional records, personal interviews, classroom observations, and daily logs. Formal procedures and instruments for each of these data collection methods were designed to identify the factors that either enhanced or impeded adults in developing competency to manage the learning process. They were validated prior to the problem investigation phase of the research. Also, the target population of adults at each research site was identified based upon admissions and registration data and a sample of new adult students was selected for study during the fall term of 1983. The sample selected was determined based upon their concentration in first term required courses. The following is a summary of the findings from the problem investigation phase.

Interview Analysis

The analysis of the interviews with 46 adults (27 females and 19 males) during the first several weeks of school reveals their perceptions of their experiences. During this period, a feeling of "I can do it" gradually emerged for those who were successful in developing competency to manage their own learning; while others never gained control and failed to shift from a preoccupation with "how" to "what" to learn and in some cases even to remain in school. An additional 25 interviews (15 females and 10 males) were conducted with adults who registered and then withdrew from school.

Figure 6 displays the impeding and facilitating factor categories that emerged from the analysis of the interview data. The table is organized to show the relationship between the facilitating and impeding factor categories when one exists.

In most instances, the categories of economic, home and family, and transportation were more important at the start of school and proved to be facilitating or impeding depending on whether or not the adult was able to handle and resolve such problems. Exceptions to this are occasional instances when an adult spouse's resentment deepened as he/she continued in school or when an adult's, usually male, sense of guilt heightened as school went on because of being unemployed and not being able to provide, as before, for his family.

The factor categories of personal goals, adjustment to school, class experiences, and institutional experiences tended to become more pronounced

as school went on. For those adults who survived the first three weeks, a sense of accomplishment or failure became a viable mental construct about mid-term or test time--six weeks into the quarter or eight weeks into the semester. This is the point where the concept of task #2--managing learning--became clear and distinguishable from learning for specific courses in that task #2 learning deals with the total experience of adults and involves their restructuring and reorganizing personal, home, work, and school relationships by handling the important aspects of these other areas and at the same time doing well in school.

Figure 6

Importance of Critical Facilitating and Impeding Factor Categories Affecting Adults in Developing the Ability to Manage Learning

Factor Categories	Impeding Factors		Facilitating Factors	
	Start Term	Mid Term	Start Term	Mid Term
Availability or lack of income/funds	——		+++++	
Presence or lack of family support	——		+++++	
Lack of travel and transportation	——			
Unique personal characteristics and problems	——			
Presence or lack of personal and career goals	——	——	+++++	+++++
Positive or negative adjustment to school	——	——	+++++	+++++
Positive or negative class experiences: teachers, instruction, and learning materials		——		+++++
Positive or negative institutional experiences: academic advising, counseling, and support services		——		+++++

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Classroom Observations

Twelve classes (six at each research site) including English, history, sociology, psychology, government, mathematics, orientation, and developmental English and math were observed 71 times during the problem investigation period. The classroom observation data relates primarily to the interview factor categories of personal goals, school adjustment, class experiences, and institutional experiences. The analysis reveals that the adults were confronted with two basic types of teaching during this period. These forms of teaching are distinguishable along the lines of subject or teacher centered instruction versus learner referenced or centered instruction. The former consisted of most, but not all, math, language, science, and social science courses while the latter generally included developmental, remedial, guidance, and some laboratory type classroom situations. Also, instructor characteristics varied considerably in terms of the apparent quality of instructor affiliation with students and the respect received from students. The learner centered instructors displayed a special sensitivity to students and were able to work effectively with them in helping them in more personally relevant ways to learn and develop specific skills and competencies.

From the institutional perspective, these two distinct approaches to instruction were accepted and regarded as legitimate. These dissimilar orientations to teaching co-exist without any real recognition, concern, or debate over their relative merits or effects on learning or the overall educational process.

Daily Diaries

A total of 35 adults (28 females and 7 males) completed daily logs. This source of data served to confirm findings from the classroom observations and interviews. The daily diaries helped to elaborate upon experiences of adults related to the factors of economic, home and family, travel and transportation, and homework aspects of school adjustment; and to illustrate the importance of these factors in the experiences of adults outside of school. The daily logs placed the school experiences of adults into perspective by showing how home, family, work, and social responsibilities were modified or reorganized to accommodate the new responsibilities associated with school.

The logs of the females, especially mothers and single parents, were particularly important. The logs show that their going to school added new responsibilities. They had to carry out all of their previous responsibilities along with new ones associated with their school work which meant, in almost every case, doing homework during normal sleeping hours. Unemployed males, who were heads of households, discovered that going to school required more time for school work than their previous jobs. This affected the time available to spend with their families and other desired activities.

Demographic Data

The demographic findings for task #2 show that of 397* target adults who registered for classes at both research sites, 21 percent withdrew

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*These 397 were part of a larger cohort of 612 adults who started the admissions process in the fall of 1983, of whom 35.1 percent failed to complete task #1.

within the first several weeks and an additional 24 percent did not register for the next term. This represents a 45 percent noncompletion rate. Data at one research site collected by the committee responsible for retention indicates a 66 percent noncompletion rate on program completion for both one and two year programs. It was not previously known that, at least in this instance, the greatest concentration of noncompleters occurred during the period of time covered by task #2. It should also be noted that of the 55 percent survivors, some of these adults were marginal in terms of having completed task #1 and meeting the requirements for completing task #2 before proceeding on to task #3.

Research Findings

The problem specification phase of the research focused on the detailed analysis and interpretation of the demographic data and research findings by representatives of both research sites and the consortium member schools, and the program consultants and staff. This process covered the period of December 1983 - November 1984 and concluded in the development of recommendations and specifications for appropriate interventions.

The draft technical report on the research findings and analysis was distributed to selected staff at both research sites, consortium school representatives, and consultants prior to convening the Intervention Planning Meeting (IPM) in November 1984. The participants at the IPM were asked to review these materials in advance of the meeting and to be prepared to discuss the research findings and analysis, assist in the interpretation of the research findings, and participate in the development of recommendations for interventions to enhance the facilitating and moderate the effect of the impeding factors.

The outcome of the IPM resulted in the selection of four factor categories as the most critical. These categories come under more direct control of the institutions and represent facilitating and impeding factor categories most amenable to change. These basic factors are:

- Personal and career goals - sense of purpose for being in school.
- School adjustment - effective study and learning skills.
- Classroom experiences - teachers, instruction, and instructional materials.
- Institutional experiences - academic advising, counseling, placement, class size, and tutoring.

The factor categories that were not selected were regarded as not as directly amenable to change. These categories include the availability of income and funds, family support, and transportation; and unique personal characteristics and problems. These factor categories were rated lower for one or both of the following reasons.

- They represent concerns such as financial aid or transportation that could be handled during the admissions process and, therefore, addressed as part of Educational Development Task #1.
- They include factors such as unemployment, personal characteristics, and family support that are not the direct responsibility of institutions and can only be addressed indirectly through special counseling and support.

Interventions were proposed for these areas during the IPM but were not rated as priority areas for the design of interventions.

Summary and Implications

The following general observations and conclusions summarize the findings and interventions for Educational Development Task #2, Managing

the Learning Process. These findings support the theoretical perspective for task #2. (See Appendix A for General Observations and Conclusions for Educational Development Task #2.)

About Educational Development Task #2

Managing learning deals with the total experience of the adult learner and involves restructuring his or her personal, family, home, social, and work life by redistributing personal time, energy, and financial resources in such a way as to meet the essential requirements of each of these domains as well as the requirements for success in school.

About Adult Learners

A precondition for adult success in managing learning is their having formulated the commitment to return to school. Many adults start school without being committed and find the absence of personal and career goals an impediment to managing learning. These adults complete the necessary formalities required for admission to school but are marginal in terms of their prospects for success during their first several weeks of school. They have to address the requirements for making the commitment to return to school (task #1) as well as the requirements for managing learning (task #2).

Adults tend to assume that going to college will be similar to their secondary school experience. They resolve to work hard, do better, and learn what is required. What they do not realize is that they have changed and, if they have a purpose for being in school, will now require that their learning be personally useful, relevant, and meaningful.

Adults who have developed personal and career goals find that their goals begin to clarify as learning occurs and become increasingly more viable in helping them manage learning. Also, this sense of goal orientation and

purposefulness serves to mediate the process of finding solutions to barriers and impediments to managing learning. In addition, the clearer their goals are for being in school, the more likely learning will be integrative and make sense in a fundamental and personal way.

When an adult learner's educational and career goals can be articulated and constantly restated in language and concepts related to learning, the more likely the learner will experience personal renewal, growth, and sense of accomplishment.

About the Teaching-Learning Process

Adult learners react intuitively to unfairness and meaninglessness in their learning experiences but have difficulty articulating the reasons for their concerns. They seem to lack the ideational background to relevantly complain or help change such circumstances. Adults want to have greater personal involvement in the learning process and to experience the curriculum in an integrative way. This is important if they are to manage or have control over their own learning. They want learning to be relevant. They do not object to either theory or practice that is or shows promise of being meaningful. They do, however, reject excessive repetition, redundancy, and abstractness as the means or substance of learning. They become excited about learning that enables them to relate concepts and skills to one another and to their personal knowledge and experience.

Instructor, discipline, and information centered teaching situations that make inadequate provision for learner interaction and participation appear to impede the development of competency to manage learning. Many adults who successfully managed their learning had difficulty with this

type of course but were either able to endure or overcome their negative effects. Most subject or lecture centered teaching appears to subscribe to a positivistic epistemology by stressing the importance, in both teaching and evaluation, on outcomes, facts, or the product knowing over the process of knowing which would have placed greater focus on the issue of learning.

About the Institution

Adult students are involved in a variety of learning situations with both positive and negative effects upon their successfully managing learning. Although some instructors are aware of the problems adults experience in their classes, they do not interpret these difficulties in the same way or uniformly provide individualized help, advice, or assistance. Adults tend to seek help from instructors, advisors, and student services staff when they believe a situation can be resolved and feel they can relate meaningfully to the person providing assistance. They do not seek help when they believe that the problem will be defined in terms of their own inability to cope or manage learning or feel that the person to provide help is going to confirm their feelings of personal inadequacy.

Instructors and academic advisors can be a facilitating influence providing they are accessible to the adult learner when needed and such assistance is provided in an open, accepting, and constructive manner.

Also, there is no effective mechanism for monitoring the progress of adult learners over the entire range of their educational experiences and identifying those adults who are having difficulty and may benefit, if contacted, from specialized assistance. Many adults left school or had decided to withdraw before anyone, or at least anyone who cared, realized that they were having difficulty.

About Instruction

Institutional policy and procedures involving staff hiring, supervision, evaluation, and development are defined and implemented without a clear understanding of or reference to the nature of learning.

Two distinct types of teaching were experienced by adult learners and are distinguishable as the traditional subject or instructor centered versus learner centered teaching. Philosophical analysis stipulates that if the objective of teaching is learning, it remains that teaching can neither be defined or authentically occur without first defining learning. Instructional leadership based upon a clearer concept of learning would be more likely to rely upon such knowledge to effect improvement in instruction and also to roll back the protective screen of "academic freedom" that appears to stand as a defense against such intrusion into the classroom.

About Learning

What has been discovered about learning through the study of adults will in all likelihood apply to all students. This is particularly true of traditional students who may, as a consequence of their secondary school experience, be unaccustomed to taking responsibility for their own learning and would benefit by being encouraged to assume such responsibility.

About Lifelong Learning

The highest level inference that can be made based upon this research is to affirm the theoretical construct that guided investigation. This affirmation is expressed through redefining the concept of lifelong learning to account, more explicitly, for the psychosocial nature of self-direction and to recognize the potential fragileness of self-directed learning in

formal educational settings, particularly when such settings tend to regard learning as a mere epiphenomenon of teaching and encourage displacement of less developed or sophisticated learner goals by course, program, and institutional goals. The revised definition of lifelong learning resulting from this study is as follows.

Lifelong or self-directed learning involves the exercise of personal initiative in organizing and developing self to meet the accepted challenges or requirements necessary to achieve one's goals in informal or life situations; or, as this may occur in formal learning settings, by meeting the requirements for success set by institutions that regulate and sanction recognition of competence and entrance into related occupational fields.

Conclusion

Results support the view that **institutional policy and practice involving governance, curriculum, and teaching are conceptualized in very general terms and function for the most part independently from clear assumptions about learning or consistent understanding of the learning process.** In fact, it would not be understating the case to say that "learning is whatever follows teaching" and that teaching appears to be an arbitrary construct ranging in emphasis from a content to a student centered learning focus. The former and predominant condition appears to impose external and artificial constraints on adults in their developing the ability to manage learning and can result, except for unusually purposeful learners, in diffusing personal learning goals and externalizing one's sense of responsibility. It is important in this regard to recognize that

to manage or have control over learning, adults need greater personal involvement in the learning process and to experience the curriculum in an integrative way in order to gain a clearer sense of how the content of each course relates to their own goals for being in school. The clearer one's goals the more feasible management of the learning process becomes and the experience of being in school making sense in a fundamental personal way. When learner goals can be clarified, refined, and articulated in language relevant to these learning experiences, the individuals appear to experience personal renewal. This in turn creates conditions upon which new concerns and problems, which may otherwise be debilitating, are now more likely to be resolved. In other words, these adults appear freer, more aware, more attentive, and are more likely to achieve balance and integration of their responsibilities. As a consequence, these adults seem to gain greater control over what happens to them, and what will happen--in essence--experience success with task #2. Adults who had not been successful in managing learning were dealing with both their purpose for being in school, task #1, and task #2, managing learning, simultaneously. These adults incurred greater instances of failure in meeting the requirements for task #2.

Intervention Process

The following is a summary of the specific task #2 interventions that were recommended by members of the IPM as most appropriate for addressing the critical factors affecting adults in developing the competency to manage learning.

The interventions selected for design are the five highest ranked interventions based on the recommendations made by IPM participants. The

descriptions of these interventions were finalized following the meeting and in collaboration with the research sites through additional planning meetings with their advisory groups. The following descriptions of these interventions include the related critical factors.

Institutional Staff Development

This intervention is considered to be basic to most of the other interventions proposed. It will address the critical factors of class experiences including instruction and will be designed to provide faculty and instructional staff with systematic exposure to current theory and concepts on teaching and learning. It will consist of guidelines and recommendations for planning and conducting a series of workshops by prominent educators with expertise in learning and learning related to selected disciplines. The objective will be to raise the level of institutional and professional awareness and concern for learning and to create conditions for individual instructor and collective examination of teaching-learning practices.

Orientation Program

This intervention addresses the concerns expressed by adults related to the critical factors: personal and career goals, school adjustment, and institutional experiences.

It will consist of design specifications for the development of several modules that can be included in a one, two, or three credit hour orientation program to be provided to adults during their first term in school. These modules will be designed to promote learning and self development in areas such as educational and career planning, development of academic skills, and understanding institutional policies and procedures related to managing the learning process.

Reading Level Analysis

This intevention addresses the critical factors related to school adjustment and class and institutional experiences. It will be designed to provide guidelines for conducting reading level analyses of college textbooks and other instructional materials. It will utilize the Minnesota Educational Computing Consortium software package "School Utilities, Volume 2" on an Apple II (48K) microcomputer in conducting reading level analyses and developing recommendations for selecting, developing, or adapting alternative instructional materials.

Career Resource Center

This intervention will address the critical factors related to personal and career goals and the instructional aspect of class experiences. It will involve designing procedures and guidelines for expanding the use of the Educational Planning Resource Center (task #1 intervention) to support faculty and student use during the period of time associated with task #2. Expansions will include guidelines for the use of community resources, employer information, and using the resource center to promote in-depth occupational or vocational exploration activities through the initial courses for each major offered by an institution.

Progress Monitoring System.

This intervention will address the critical factors related to school adjustment and class and institutional experiences. The design for the progress monitoring system will involve use of the microcomputer and appropriate software to gather and organize information on a short-term basis to identify students experiencing difficulties in school due to attendance,

class performance, homework, etc., and courses where more than one student may be having difficulty. Monitoring data will be generated on "exceptions," i.e., students or groups of students who may potentially be having difficulty meeting course requirements. Reports are to be provided to academic advisors and student services staff to help them become more responsive to student needs and provide for appropriate follow-up.

Two of the intervention designs--Reading Level Analysis and Career Resource Center--will be extensions of interventions for Educational Development Task #1, Adults Making the Commitment to Return to School. All five interventions will be designed to a level that the research sites and consortium schools can complete development and validation using local resources. The design of these interventions will include, but not be limited to, the following.

- Conduct literature review on specific intervention topics to identify the state of the art for each intervention area and available resources for the design and, where possible, the operation of each intervention.
- Define each intervention and describe its relationship to task #2 research findings.
- Develop specific objectives and outcomes for each intervention.
- Prepare the intervention design including content and process specifications and the identification of available materials and resource requirements.
- Develop guidelines for subsequent intervention development, validation, and use.

Educational Importance

Many adults are having difficulty with or are unsuccessful in entering into and completing postsecondary educational and vocational-technical

programs. This type of preparation is critical if these adults are to enter or re-enter the work force, find new employment because of lay-offs, or gain new skills to advance in their present jobs. The results of this study highlight the importance of viewing admissions as a learning process--essential to helping adults make a commitment to return to school. The R & D stage focusing on dissemination of the research findings and the intervention resource materials that address this educational problem is currently underway with the LLP consortium schools and postsecondary schools in the AEL Region, and nationally through professional conferences.

Adults generally participate in educational and vocational-technical training based upon personal objectives and goals. When their personal goals for being in school cannot be integrated with the perceived goals of the courses they are taking, they fail to gain a sense of personal control over the learning process. Instructor and subject centered learning situations, that do not make adequate provision for learner interaction and participation, impede development of the competency to manage learning. Positive forms of learning provide adults with a growing resource of relevant knowledge to articulate in more and more refined terms their purpose for being in school and serve as a source of motivation for continued learning.

This research project endeavored to examine adult learning in formal educational settings using lifelong or self-directed learning constructs. It employed an educational development stage conceptualization as a framework for examining learning and analyzing adult learning experiences. The results support the theoretical perspective on adult educational development and provide a conceptual tool for organizing and clarifying important aspects of adults developing the ability to manage learning during their initial

period in school. The refined conceptualization serves to: (1) provide a basis for uniting the as yet conceptually disparate areas of informal and formal learning, and (2) describe and preserve the integrity of the adult learner and the self-directed learning process in formal educational settings.

Appendix A:

General Observations and Conclusions
for Educational Development Task #2

GENERAL OBSERVATIONS AND CONCLUSIONS

Educational Development Task #2: Adults Managing Learning

About Educational Development Task #2

1. Managing learning deals with the total experience of the adult learner and involves restructuring his or her personal, family, home, social, and work life by redistributing personal time, energy, and financial resources in such a way as to meet the essential requirements of each of these domains as well as the requirements for success in school.

About Adult Learners

2. Many adults complete the necessary formalities required for admission to school but do not formulate a corresponding commitment that would lead to having personal and career goals. These adults are marginal in terms of their prospect for managing learning and will have to address the requirements for making the commitment to return to school and managing learning during their first several weeks of school. Greater competence and expertise is needed by student services, academic advising, and instructional staff in recognizing these adults and assisting them during both the admissions process and the initial period of school.

3. A precondition for adult success in managing learning is their having formulated the commitment to return to school (task #1). Many adults start school without being committed and find the absence of personal and career goals an impediment to managing learning.

4. Adults expect that returning to school will be similar to their secondary school experience and resolve to do better and to learn what is required. What they do not realize is that they have changed and now require that learning be personally relevant and meaningful.

5. Adults with personal and career goals find that their goals clarify through learning and become increasingly more viable in helping them manage learning.

6. An adult learner's sense of goal orientation and purposefulness serves to mediate the process of finding solutions to barriers and impediments to managing learning.

7. The clearer an adult learner's goals for being in school are, the more likely learning will be integrative and make sense in a fundamental and personal way.

8. When an adult learner's educational and career goals can be articulated and constantly restated in language and concepts related to learning, the more likely the learner will experience personal renewal, growth, and sense of accomplishment.

About the Teaching-Learning Process

9. Adults must have greater personal involvement in the learning process and experience the curriculum in an integrative way if they are to manage or have control over their own learning.

10. Adult learners react intuitively to unfairness and meaninglessness in their learning experiences but have difficulty understanding and articulating the reasons for their concerns. As a result, they lack the ideational background to relevantly complain or help change such circumstances.

11. Instructor, discipline, and information centered teaching situations that make inadequate provision for learner interaction and participation impede development of the competency to manage learning. These forms of teaching tend to externalize responsibility for learners and diffuse personal goals. Many adults who successfully managed learning had difficulty with these courses but were able to either endure or overcome their negative effects.

12. Adults want learning to be relevant. They do not object to either theory or practice that is or shows promise of being meaningful. They do, however, reject excessive repetition, redundancy, and abstractness as the means or substance of learning. They become excited about learning that enables them to relate concepts and skills to one another and to their personal knowledge and experience.

13. Most subject or lecture centered teaching violates the epistemology of the discipline being taught by stressing the importance, in both teaching and evaluation, of facts and information over the processes and products of knowing.

About the Institution

14. Adult students are involved in a variety of learning situations with both positive and negative effects upon their successfully managing learning. Although specific instructors are aware of some of the problems adults experience in their classes, they do not interpret these difficulties in the same way or uniformly provide individualized help, advice, or assistance. Also, there is no effective mechanism for monitoring the progress of adult learners over the entire range of their educational experiences and identifying those adults who are having difficulty and may benefit, if contacted, from specialized assistance.

15. Academic advising can be a facilitating influence in managing learning providing the advisor is accessible to the adult learner when needed and such assistance is provided in an open, understanding, accepting, and constructive manner.

16. Adults tend to seek help from instructors, advisors, and student services staff when they believe a situation can be resolved and feel they can relate meaningfully to the person providing assistance. They do not seek help when they believe that the problem is due to their own inability to cope or manage learning and feel that the person to provide help is going to confirm their feelings of personal inadequacy.

17. Two distinct types of teaching were experienced by adult learners and are distinguishable as the traditional subject or instructor centered vs. learner centered teaching. The former consists of most but not all math, language, science, and social science courses while the latter includes developmental, remedial, and most guidance and laboratory type classroom situations. These opposing systems of teaching apparently co-exist within institutions without any real awareness, concern, or debate about their relative merits or potential for improving the learning of adults.

18. Institutional policy and procedures involving hiring and supervision and staff evaluation and development are defined and used without clear understanding of or reference to the nature of learning.

19. The objective of teaching is learning, so it remains that teaching can neither be defined or authentically occur without first defining learning. Instructional leadership based upon a clearer concept of learning is more likely to rely upon knowledge and competence rather than instrumental or political efforts to effect improvement in instruction and roll back the protective screen of "academic freedom" as a defense against intrusion into the classroom to improve the teaching-learning process.

About Learning

20. What has been discovered about learning through the study of adults will in all likelihood apply to all students. This is particularly true of traditional students who may, as a consequence of their secondary school experience, be unaccustomed to taking responsibility for their own learning and would benefit by being encouraged to assume such responsibility.

About Lifelong Learning

21. Lifelong or self-directed learning involves the exercise of personal initiative in organizing and developing self to meet the accepted challenges or requirements necessary to achieve one's goals in life situations (informal learning)--or, as this may occur in formal learning settings, to achieve one's goals by meeting the requirements for success set by institutions that regulate and sanction recognition of competence.

VI. LIFELONG LEARNING PROGRAM DISSEMINATION ACTIVITIES

During 1981, seven two-year postsecondary institutions were identified as potential sites for involvement in the Lifelong Learning Program (LLP) research and development efforts. Visitations were made and meetings were held with the Presidents, Directors of Curriculum, Directors of Student Services, and other key staff. The LLP study was discussed and data were collected to evaluate each institution's degree of interest in participating and the contributions each could make to the study. Based upon criteria established for institutional selection, Ashland Community College located in Ashland, Kentucky and Southwest Virginia Community College in Richlands, Virginia, were invited to participate. Both institutions responded in writing accepting the conditions for participation and indicating their commitment to collaborate with AEL in the study.

Personnel from the five institutions not selected indicated an interest in being involved even though they were not a formal part of the study. These schools included: Hocking Technical College, Nelsonville, Ohio; Parkersburg Community College, Parkersburg, West Virginia; Southern West Virginia Community College, Logan, West Virginia; Washington Technical College, Marietta, Ohio; and Wytheville Community College, Wytheville, Virginia. A committee was formed with one representative from each of the five institutions and two research sites. The committee would provide informal reactions and suggestions to the study, and be utilized as a first step in dissemination as interventions were designed, tested, and made available for implementation at each phase of the study.

This committee first convened on May 24-25, 1983, in Charleston, West Virginia. The purpose of this meeting was to provide the seven member institutions with an opportunity to review and discuss the critical factors identified for Educational Development Task (EDT) #1, "Adults Making the Commitment to Return to School;" sort and group factors based upon their perception of factor relationships; and to consider interventions that might be used to enhance the facilitating and moderate the impeding factors identified during the research.

This committee met again on July 26-27, 1984, in Charleston. The objective of this meeting was to bring consortium group members up-to-date on the Lifelong Learning Program and give a detailed report on the interventions developed for EDT #1. The consortium group showed enthusiasm and an interest in field testing the interventions. However, specific plans for field testing were not made until after the consortium school representatives had an opportunity to go over the materials in greater detail and meet with appropriate personnel of their respective institutions for debriefing sessions.

On November 2-4, the LLP staff held an Intervention Planning Meeting for EDT #2, "Adults Managing the Learning." This meeting was also held in Charleston and participants included personnel from the two research sites and the five consortium schools. The meeting focused on a review of the Task #2 Technical Report and the development of recommendations for interventions.

During this same time period, dissemination activities got underway at the national level. The American Association of Adult and Continuing Education held its annual conference in Louisville, Kentucky, on November 7-10. Walt Adams, project director for the LLP, made a presentation on the "Study of Adults Making the Commitment to Return to School." Walt was assisted by Naomi Christian and Carl Lively two staff members from the ACC research site.

In addition, the National Center for Research in Vocational Education held its Seventh Nationwide Education Dissemination Conference on November 13-15. Walt Adams made a presentation on EDTs #1 and #2 under the title of "Adult Vocational Development."

In 1985, regional dissemination activities started in the State of Virginia. During a meeting of the Virginia Community College System, Admissions and Records Conference in Charlottesville, EDT #1 research findings and interventions were presented and discussed with representatives of all the community colleges in Virginia and state-level administrative staff.

Between the months of March and May 1985, both national and regional dissemination activities took place.

Regional dissemination included attending the West Virginia College Personnel Association convention in Charleston on April 18-19, 1985, and making a presentation on the LLP and Task #1 to personnel from both two and four-year colleges in West Virginia. Participants also included represenatives from the national ACPA organization.

National dissemination activities included presentations on the LLP and related research to a session of the American College Personnel Association in Boston, March 23-26, 1985; and to a session of the American Educational Research Association held in Chicago, March 31-April 4, 1985.

Dissemination activity during the summer of 1985, included presentations to two national and five regional conferences or workshops. A regional workshop conducted at the University of Louisville, Shelby Campus, on June 5, 1985, provided LLP staff with the opportunity to discuss the Task #1 intervention Staff Training Package: Admissions Office and Support Staff. Participants were from the Louisville area colleges and universities.

Participation in the Institute for Management of Lifelong Education, Harvard University, June 9-20, provided an opportunity to disseminate LLP research and findings to institutional planning and policy level professionals in lifelong education. Institute participants were national in scope and ranged in responsibility from university presidents to directors of adult and continuing education and directors of student personnel programs in community colleges.

The conference sponsored by the Center for the Study of Higher Education in Memphis, Tennessee, in July provided an opportunity to deliver two papers to both national and regional professionals. The conference theme "Competence and Commitment: Educating for Abilities that Last" related directly to LLP research and provided opportunities plus contacts for program dissemination.

In addition to presentations at national and regional conferences and workshops, a summary of Task #1 research was published in the National Vocational Guidance Association newsletter in June 1985.

Also, numerous copies of the research summaries for Task #1 and #2 were sent in response to mail requests from individuals who had come into contact with LLP research through the American Educational Research Association, American College Personnel Association, and similar conference programs.

The LLP staff held a Dissemination Conference at Pipestem State Park near Athens, West Virginia, on October 29-31, 1985. Attending the meeting were 35 representatives from three schools and the Board of Regents in West Virginia, five schools from Virginia, two from Tennessee, six from Kentucky, and two consortium member schools from Ohio. In keeping with the LLP scope of work to establish and maintain a network of professionals in each AEL member state, the conference focused on establishing a network of schools interested in the LLP research findings and educational change through use of the LLP interventions. The meeting was also designed to initiate the process of selection of two LLP demonstration sites from each AEL member state for operation during FY 86.

As a result of the meeting, there was considerable enthusiasm for the idea of a network supported by AEL that could provide mutual support and share resources, both as a whole and in regional subgroups. Also, the idea of limiting the demonstration sites in each state to two schools was rejected by the participants in favor of expanding the number of

demonstration sites based upon the willingness of schools to implement the LLP interventions. The group also expressed willingness to provide leadership in setting up state conferences for introducing LLP findings and interventions and voiced support for continuation of the LLP project.

In addition to the conference, dissemination activity during the latter part of 1985, included presentations to four national and four regional conferences or workshops.

On October 9-11, LLP staff presented Task #1 "The Admissions Process" to the Kentucky Association of College Registrars and Admissions Officers during their 62nd annual meeting held in Frankfort, Kentucky.

LLP dissemination efforts continued during the Month of October with a presentation made on Tasks #1 and #2 to the West Virginia Community College Association at Twin Falls State Park in West Virginia, on October 16-18. The Conference theme was "Community Colleges Planning for Excellence" and the LLP presentation was the "Adult Learner--Making the Commitment to Return to School and Managing Learning." In addition, on October 21-22, a staff member traveled to the University of Kentucky in Lexington to speak to personnel from the University Extension Service on LLP Tasks #1 and #2. Discussions were held with several different groups concerning adult learning.

On November 5-9, LLP dissemination efforts continued through a presentation made to the American Association of Adult and Continuing Education meeting in Milwaukee, Wisconsin. The theme of this conference was "Lifelong Learning: Key to Living" which related directly to LLP research and interventions.

At the National Institute of Education's Symposium on Education and Work, "Implications for Policymakers and Practitioners" held in Washington on November 18-19, LLP staff presented on the two research studies on the educational development of adults -- adults making the commitment to return to school and adults managing learning."

Also during November, LLP staff coordinated a meeting at Memphis State University with representatives from the two LLP research sites and the staff of the Center for Higher Education (CSHE). The purpose of the two-day meeting was to explore ways in which the CSHE could participate in setting up and servicing a LLP network after the completion of the FY 86 NIE contract.

To round out the month's dissemination efforts, LLP staff conducted a seminar on November 26, in cooperation with Wytheville Community College, for counselors, administrators, and other personnel who work with youth and adults in a six-county Virginia area. This seminar provided area professionals with an introduction to the use of the Educational Planning Resource Center and related interventions.

On November 30, LLP Tasks #1 and #2 were presented to members of the Council for Adult and Experiential Learning and Commission on Higher Education and the Adult Learner, 1985 International Assembly "Tailoring Education for Adults" at their yearly conference in Boston.

Between December 1985 and January 1986, eleven demonstration sites were selected as a result of site visits. The chart on the following page lists the LLP demonstration sites and proposed interventions. Contact people for each site are listed on the back of the chart.

DEMONSTRATION SITES AND PROPOSED INTERVENTIONS

COMMUNITY COLLEGES BY STATES	ADMINISTRATIVE INTERVENTIONS						STAFF TRAINING PACKAGES					SLIDE/TAPE PROGRAMS			ADULT COURSES
	Admissions Management Information Tracking System (ADMITS)	Validation of Placement Tests	Toll-free Telephone Access Number	Information Booth	Reading Level Analysis of Admissions Document	Educational Planning Resource Center	Research Findings	Academic Advising & Counseling Staff	Adult Commitment	Educational Planning Resource Center	Admissions Office & Support Staff	Application Process	Academic Advising Process	Registration Process	Educational Planning Course
VIRGINIA															
Wytheville Community College	F86	F86	F86	F86	F86	OP	C-5/86	C-5/86	C-5/86	C-9/86	C-5/86	F86	F86	F86	F86
New River Community College	F86		AF	F86	F86		C-5/86	C-5/86	S87		C-5/86	W86	W86	W86	
Mountain Empire Community College	F86	F86	F86	F86	F86	F86	C-5/86	C-6/86	F86	F86	C-5/86	F86	F86	F86	F86
Patrick Henry Community College	F86				F86	F86				F86	F86	F86	F86	F86	UC
KENTUCKY															
Hazard Community College	F86	F86		F88	OP	F86	F86	F87	F88	F87	F86	F88	F88	F88	F86
Southeast Community College	F86	F86	UC	F86	F86	F86	S87	S87	S87	F86	S87	F86	F86	F86	F86
Sommerset Community College	S87	F87	UC	F86	UC	F86	F86	S87	S87	UC	S87	F88	F88	F88	F86
WEST VIRGINIA															
Parkersburg Community College	F88	F86	W86		F86	AF	F86	W86	W86	W86	W86	F86	UC	UC	AF
Southern West Virginia Community College	F86	F86		F86	F86	F86	C-5/86	C-5/86		F86	F86	F86	F86	F86	F86
TENNESSEE															
Roane State Community College*			F86	F86	F86						F86				
Tri-Cities State Technical Institute	OP			F86	F86	F/W86	F86	F86	F86	F86	F86			OP	F86

*Special EDT #2 Staff Training Program conducted April 24, 1986

Legend

F - Fall
W - Winter
S - Spring
C - Completed

OP - Already Operational
UC - Under Consideration
AF - Alternate Form

LLP-Contact Persons for Research and Demonstration Sites

Research Sites

Ashland Community College
1400 College Drive
Ashland, Kentucky 41101
606/329/2999
Robert Goodpaster, Director

Southwest VA Community College
Richlands, Virginia 24641
703/964-2555
Harold VanHook, Dean of Inst.
Armand Opitz, Dean, Student Development Services

Demonstration Sites

Hazard Community College
Hazard, Kentucky 41701
606/436-5721
Harrison Fields, Assistant Director

Mountain Empire Community College
Big Stone Gap, Virginia 24219
703/523-2400
Linda Kilgore, Dean of Academic and Student Services

New River Community College
P. O. Drawer 1127
Dublin, Virginia 24084
703/674-4121
Doug Warren, Dean of Instruction and Student Services

Parkersburg Community College
Parkersburg, West Virginia 26101
304/424-8000
Jan Morris, Student Services Counselor

Patrick Henry Community College
P. O. Drawer 5311
Martinsville, Virginia 24115
703/638-8777
Colin Ferguson, Dean of Academic and Student Development

Roane State Community College
Harriman, Tennessee 37748
615/354-3000
Eileen Sheahan, Student Retention

Somerset Community College
Somerset, Kentucky 42501
606/589-2145
Ernest Cronan, Assoc. Director
Alvis Brown, Counselor Recruitment Coordinator

Southeast Community College
Cumberland, Kentucky 40823
606/589-2145
Anthony Newberry, Associate Director

Southern WV Community College
Logan, West Virginia 25601
304/752-5900
James Cox, Director of Institutional Res. & Grants

Tri-Cities State Technical Institute
Blountville, Tennessee 37617
615/323-3191
Sally Essin, Counseling and Assessment

Wytheville Community College
Wytheville, Virginia 24382
703/228-5541
Kay Kincer, Assistant Director of Instructional Services

Dissemination activities got underway in 1986 with two statewide dissemination conferences held in February. The first conference was held for representatives of West Virginia universities and colleges. This conference took place on February 20-21, at Parkersburg, West Virginia. Forty-nine people were in attendance: 13 from four-year colleges, 28 from two-year colleges, one representatives from the College of Graduate Studies, three representatives from the Board of Regents, one representative from the Center for the Study of Higher Education, Memphis State University, and three AEL staff members.

The second statewide dissemination conference was held on February 27-28, at Roanoke, Virginia. Forty people were in attendance: the Deputy Chancellor from the Virginia Community College System, 34 from community colleges, two from a four year college, one from the Center for the Study of Higher Education, Memphis State University, and two AEL staff members.

The purpose of these conferences was to serve as the first step in the process to establish an informal network of colleges and universities in West Virginia, Tennessee, Kentucky, and Virginia; to introduce the LLP research findings and interventions for Tasks #1 and #2; and to help identify resource people as part of the network.

The third and fourth statewide dissemination conferences were held in May, 1986. The third conference was held May 13-14, at the State Board of Regents Office in Nashville, Tennessee. An invitation went out from the State University and Community College System of Tennessee to all Chief Academic Officers. Twenty-nine people were in attendance: four from

four-year colleges; 17 from two-year colleges; three representatives from the State University and Community College System; one network resource person; one representative from the Center for the Study of Higher Education, Memphis State University; and two AEL staff members.

The fourth conference was held on May 28-29, at Elizabethtown, Kentucky. Nineteen people were in attendance: nine people from two-year colleges; one from a four-year college; three from the Kentucky Community College System; one person from the Center for the Study of Higher Education, Memphis State University; three network resource people; and two AEL staff members.

These two conferences completed the four state dissemination conferences held to introduce the LLP research findings and interventions for Tasks #1 and #2; to establish an informal network of colleges and universities in the four-state AEL Region; and to identify resource people as part of the network.

Network resource people were identified from each of the demonstration sites and the four statewide dissemination conferences. To date, thirty-three people have indicated their interest and availability to serve. Many have already been engaged in the delivery of interventions at demonstration sites as well as other schools. See Appendix B for a copy of the LLP Network Resource Directory.

Other dissemination activites for 1986 included the following:

On March 28, a special consortium meeting was held and included the following schools: New River, Wytheville, Virginia Highlands, Mountain Empire, and Southwest Virginia Community Colleges. The purpose of this meeting was to consider dedicating their yearly consortium group meetings,

held in the Fall, to further the development of EDT #2.

On April 7-13, Walt Adams attended the American College Personnel Association Conference held in New Orleans.

On May 19, Walt Adams met with Dr. Don Puyear to explore dissemination of Tasks #1 and #2 research findings and interventions for the entire Community College System and in addition scheduled an executive briefing for all Virginia Community College System Presidents on August 15, on LLP research and interventions. The executive briefing was the first step in a comprehensive strategy to involve all VCCS schools in the implementation of EDT #1 interventions.

The Lifelong Learning Program staff held their final conference at the Sheraton Inn, Bluefield, West Virginia, on August 4-6, 1986. The purpose of the conference was to foremalize the LLP Network established during FY 86 through four state dissemination conference and through work with eleven demonstration sites and two research sites. Plans were pursued for the Center for the Study of Higher Education, Memphis State University, to become the focal point for coordination of the LLP Network and future LLP regional and national dissemination activities at the conclusion of the AEL LLP work. The conference also focused on updating progress made in the implementation of interventions at the demonstration sites and looking at problem interventions that may require additional training or technical assistance to implement; presenting revisions for selected Staff Training Packages for Task #1; and introducing the research findings and intervention designs for Task #2 "Adults Managing Learning."

Thirty-five people from the AEL four state Region attended the conference with three representing State Boards of Regents, (Tennessee, Virginia, and West Virginia); four from four-year colleges (Ohio State, East Tennessee State, West Virginia College of Graduate Studies, and Memphis State); four educational consultants who serve as LLP Network Resource People; twenty-two community colleges that also includes a large majority of Resource People; one staff member from the CSHE; and four AEL staff members.

Included in the LLP scope of work to establish and maintain a network of professionals in each AEL member state was the development of an information bulletin to be mailed to network members to build network interest and participation.

In June 1986, the first LLP newsletter was developed to serve as a vehicle to keep network members up-to-date on LLP events. The second newsletter was mailed to network members in September. Copies of these newsletters can be found as Attachment 1. Future copies of the LLP newletter will be incorporated into the national newsletter sent out from the Center for the Study of Higher Education at Memphis State University.

In addition to the direct dissemination initiatives mentioned above, indirect effects of the research and dissemination are beginning to occur. For example, the State University and Community College System of Tennessee initiated a survey of all member institutions to determine what efforts will be required to meet system objectives for the 1980's. AEL research is referenced in this request for information on the following activities with adults.

1) Contacting prospective adult students;
2) Providing appropriate orientation to the enrollment process;
3) Providing appropriate academic advisement;
4) Testing and accurately placing adults by competency levels;
5) Registering full and part-time adult students;
6) Monitoring progress through the academic program;
7) Providing specialized career and program counseling;
8) Facilitating employment placement;
9) Giving special attention to part-time, evening programs, and off-campus sites in demonstrating a commitment to older student needs;
10) Developing contractural arrangements with business and industry to enhance educational opportunities for working adults;
11) Designing courses appropriate for professional licensure or relicensure;
12) Focusing faculty development activities on the needs of the adult learner.

Also, the Educational Testing Service (ETS), Austin, Texas Center will be conducting a special workshop in Arizona using LLP research findings and presenting SIGI as an intervention for assisting students with EDT #1 and #2. This workshop is expected to be a prototype for six national conferences to be sponsored by ETS during the 1986-87 school year. The following pages consist of a Table for the Lifelong Learning Program's national and regional dissemination activites from March 3, 1984, through September 17, 1986.

The following pages consist of a Table for the Lifelong Learning Program's national and regional dissemination activities from March 3, 1984, through September 17, 1986.

It is expected that the Lifelong Learning Program will continue through the efforts of the LLP network, comprising 33 resource people and the thirteen research and demonstration sites currently in operation. The Center for the Study of Higher Education at Memphis State will serve as the focal point for information about the progress of the network.

LIFELONG LEARNING PROGRAM NATIONAL AND REGIONAL DISSEMINATION

Date	Location	Organization	Topic	National	Regional
3/3/84	Washington, DC	Interagency Group, National Institute of Education (NIE)	EDT #1	X	
7/26-27/84	Charleston, WV	Consortium Group, Lifelong Learning Program (LLP)	EDT #1 EDT #2		X
10/29/84	Charleston, WV	AEL Annual Meeting	LLP		X
11/6-11/84	Lexington, KY	National Conference, American Association of Adult and Continuing Education (AAACE)	EDT #1	X	
11/13-15/84	Columbus, OH	National Dissemination Conference, National Center for Research in Vocational Education (NCRVE)	EDT #1	X	
1/14/85	Washington, DC	Planning Conference for Dis.-semination of NIE Research, National Institute of Education (NIE)	LLP	X	
2/21-22/85	Charlottesville, VA	Admissions and Records Personnel, Virginia Community College System	EDT #1		X
3/24-27/85	Boston, MA	National Conference, American College Personnel Association (ACPA)	EDT #1	X	
3/31-4/4/85	Chicago, IL	National Research Conference, American Educational Research Association (AERA)	EDT #1	X	
4/18-19/85	Charleston, WV	State Conference, West Virginia College Personnel Association (WVCPA)	EDT #1		X
5/21/85	Charleston, WV	Senator Robert C. Byrd's Staff	LLP	X	X
6/4/85	Louisville, KY Belknap Campus	Student Personnel and Professional Staff, University of Louisville	EDT #1 EDT #2		X

(continued)

Date	Location	Organization	Topic	National	Regional
6/5/85	Louisville, Ky Shelley Campus	Admissions Office and Support Staff, Student Services, Career Colleges	EDT #1		X
6/9-20/85	Cambridge, MA	Institute for Management of Lifelong Education, Harvard University	EDT #1 EDT #2	X	
7/8-11/85	Memphis, TN	National Conference, Center for the Study of Higher Education, University of Memphis	EDT #1 EDT #2	X	X
7/23-26/85	Richmond, VA	Virginia State Counseling Conference (Secondary and Postsecondary)	LLP		X
10/10/85	Frankfort, KY	State Conference, Kentucky Association of College Records and Admissions Officers	EDT #1		X
10/17/85	Twin Falls State Park, WV	Conference on Planning for Excellence, West Virginia Community College System	EDT #1 EDT #2		X
10/22/85	Lexington, KY	University of Kentucky Academic Support Services	EDT #1 EDT #2		X
10/29-31/85	Pipestem, WV	LLP Dissemination Conference	EDT #1 EDT #2		X
11/6-9/85	Milwaukee, WI	American Association of Adult and Continuing Education	LLP	X	
11/18-19/85	Washington, DC	NIE Research Symposium	LLP	X	
11/19-20/85	Memphis, TN	Center for the Study of Higher Education	LLP EDT #1 EDT #2 Network	X	X
11/30-12-3/85	Boston, MA	Council for the Advancement of Experimental Learning	LLP EDT #1 EDT #2	X	
2/13-14/86	Charlottesville, VA	Admissions & Records Personsel, Virginia Community College System	EDT #1		X

(continued)

Date	Location	Organization	Topic	National	Regional
2/20-21/86	Parkersburg, WV	West Virginia State Dissemination Conference	LLP EDT #1 EDT #2 Network		X
2/27-28/86	Roanoke, VA	Virginia State Dissemination Conference	LLP EDT #1 EDT #2 Network		X
4/24/86	Harriman, TN	Roane State Community College	EDT #2		X
5/7/86	Dublin, VA	New River Community College	EDT #1		X
5/9/86	Logan, WV	Southern West Virginia Community College	EDT #1		X
5/13-14/86	Nashville, TN	Tennessee State Dissemination Conference	LLP EDT #1 EDT #2 Network		X
5/28-29/86	Elizabethtown, KY	Kentucky State Dissmenination Conference	LLP EDT #1 EDT #2 Network		
5/30/86	Big Stone Gap, VA	Mountain Empire Community College	EDT #1		X
6/3/86	Charleston, WV	Collegiate Support Services and Counseling Staff West Virginia State College	EDT #1 EDT #2		X
6/6/86	Big Stone Gap, VA	Mountain Empire Community College	EDT #1		X
6/11-12/86	Wytheville, VA	Wytheville Community College	EDT #1		X
7/8/86	Columbus, Ohio	Graduate Course on Adult Learning (Lecture) Ohio State University	EDT #1 EDT #2	X	X
7/14-16/86	Wytheville, VA	Wytheville Community College	EDT #1		X

(continued)

Date	Location	Organization	Topic	National	Regional
8/4-6/86	Bluefield, WV	AEL/LLP Network (CSHE, Demonstration and Research Sites, State Board of Regents, LLP Resource people)	LLP EDT #1 EDT #2 Network		X
8/12/86	Richmond, VA	Presidents Briefing Virginia Community College System	LLP EDT #1 EDT #2 Network		X
8/18/86	Martinsville, VA	Patrick Henry Community College	EDT #1		X
8/19-20/86	Wytheville, VA	Wytheville Community College	EDT #1		X
9/10-11/86	Jackson, TN	Jackson State Community College	EDT #1		X
9/12/86	Memphis, TN	Center for the Study of Higher Education	Network	X	X
9/17/86	Wytheville, VA	Wytheville Community College	EDT #1		X

VII. CONCLUSIONS

The major concepts that emerged as a result of the research conducted on "Adults Making the Commitment to Return to School" and "Managing Learning" are presented in this section of the final report. The major areas to be summarized are as follows:

- the use of qualitative methodology in studying adult educational development;
- the revised status of the concepts of educational development and self directed learning;
- the intervention process and educational change; and
- the dissemination of educational research findings and interventions.

The Use of Qualitative Methodology

It was proposed in the original research plan to use qualitative research methodology to conduct two indepth case studies on adult educational development in postsecondary institution. This strategy was selected to allow project researchers to go beyond the identification of the critical facilitating and impeding factors to select, develop, and validate interventions. This assumption has proved to be correct and resulted in the integration of qualitative research procedures with educational R & D methodology. Qualitative methodology was employed to conduct the basic research and the R & D methodology for the validation of appropriate interventions. This combined procedure also became the means of validating the basic research findings, as the interventions proved to be appropriate as means for enhancing the critical facilitating factors or moderating the effect of the critical impeding factors. The use

of case studies conducted at two postsecondary institutions proved to be an important means of going beyond previous research on barriers to adult learning. Previous research has for the most part been either survey in nature or focused on the study of self-directed learning in informal educational settings. The case study approach made it possible to establish "contextuality" for the critical factors and to relate the critical factors directly to learner or institutional characteristics. This knowledge made it possible to identify those critical factors that were judged to be ameanable to change and to design, develop, and validate specific interventions to address the promotion of success for the Educational Development Tasks.

A second major concept that emerged as a result of the use of qualitative methodology involves the use of philosophical or critical analysis to define educational concepts. A prime example of the use of critical analysis involves the study of the admissions process. It was discovered that the concepts and language used by the research sites were not adequate when taking the adult learners perspective into account. For example, it was discovered that the language used to describe the steps in the admissions process was geared to the institution's perspective and requirements. There were no well developed corresponding meanings that described the prospective student's view of the process. This means that the language and concepts used to explain and drive admissions were constructed to meet the demands required by the institution to make decisions and classify prospective students with regard to the varied requirements for matriculation and admissions to selected programs.

The prospective adult student, therefore, had to accommodate and employ the institutionally oriented terminology in negotiating the admissions process This problem was discovered during the context analysis for EDT #1 when the five steps for the admissions process were derived, and based upon the information available, described as "institutional procedures" in the then emerging Admissions Process Model. The second part of the model was termed "individual procedures". It remained blank for a considerable period of time in spite of the fact that several project advisory and consortium group meetings considered the problem and attempted to identify the content of this portion of the model. The Individual Procedures portion of the model gradually filled in after completion of the Problem Investigation phase of the research and then was completed during the Problem Specification phase. The result was to array the adult learning content identified as important during admissions across the chart to correspond to the steps in the process used by the institution. The important role played by critical analysis was to facilitate recognition of the problem and to impel the redefinition of the learning requirements of adults during admissions. The reconceptualized perspective resulting from the use of critical analysis postulated that the admission process is a learning process, and that learning is essential to adults developing the commitment to return to school. With the reconceptualized model in mind, it then became possible to consider the new language to present admissions as a set of logically related knowledge and values essential to promoting learning and the commitment to returning to school.

The use of qualitative methodology also made an important contribution to the interpretation of the research findings. Conceptually it fostered efforts to promote the involvement of research staff, site representatives, and adults in the interpretation process and the selection of interventions. This process helped to establish the institutional relevancy of the data and promote ownership of the interventions developed through their participation in the R & D process.

The last important concept to emerge, with regard to the use of qualitative methodology, was the impression that the rationality that guided the research and the validation of the interventions was in fact "a way of doing business" or operating in a manner that would promote institutional growth. By this, it is meant that the ordinary every day operations involving governance, curriculum, teaching, and learning would be served better by approaching the planning, delivery, and evaluation of these activities qualitatively. This conceptualization is not intended to discount the contributions of quantitative rationality, but only to recognize the limitations of such rationality in dealing with educational concerns contextually or in terms of larger systems. The combination of qualitative methodology, critical analysis, and educational R & D processes constititute an excellent model for conducting the normal everyday business of postsecondary education.

Status of Educational Development Tasks and Self-Directed Learning Concepts

The concepts of Educational Development Tasks (EDT) and self-directed

learning constitute the two main constructs for the LLP research. The concept of EDT was more general at the start of research, but took on greater specificity as the project progressed. The following is the current definition of an EDT based upon the research completed for Tasks #1 and #2:

> Educational Development Tasks are generalized stages of individual development associated with active membership in an institution such as a school, college, military service, or other social organizations. Educational Development Tasks are important during periods where learning and the acquisition of knowledge, skills, and attitudes is the primary focus of participation.

Research completed to date has helped establish the validity of EDTs #1 and #2 and provide greater specificity for each of the task definitions.

The second major construct related to the LLP research involves the concept of self-direction or self-directed learning. The term was used in a general sense at the start of the research, almost as a synonym for lifelong learning. It now, however, is regarded as the most appropriate concept to describe research findings, because it relates more directly to educational development theory. The term lifelong learning is more general or nondescript in meaning. The current definition of self-directed learning is as follows:

> Self-directed learning involves the exercise of **personal initiative** in **organizing and developing** self to meet the **accepted** challenges or requirements necessary to **achieve one's goals.** In **formal** educational settings, **this occurs as learners** are able to integrate course goals and content with their purposes for being in school and meet the **requirements for success** set by the educational institution and their individual programs of study and course instructors.

An important implication of the refined definition of self-directed learning is that of bridging the conceptual gap between learning in informal and formal settings. Although formal education is recognized in the literature as an important part of lifelong learning, the concept of self-directed learning has been generally restricted to learning of an informal nature such as learning projects. It was initially unclear how self-directed learning applied in formal educational settings. The above definition accounts for the application of the concept in formal educational settings by recognizing the fragile nature of the concept and and the need for adults to experience learning an integrative way. Such clarification is another example of the benefits of using critical or philosophical analysis for the definition and refinement of educational concepts.

The Intervention Process

The intervention concept evolved throughout the Problem Investigation and Specification phases of the research and the R & D process, with particular emphasis on the dissemination stage. The original concept was that an "intervention" would include policy, procedures, or curriculum that could be developed and used as means for enhancing critical facilitating and moderating the effects of critical impeding factors. Also, it was thought that a limited number of interventions would be required for each EDT. It became apparent, however, as part of Task #1 that the range of critical factors and complexity of the admissions process would require numerous specific interventions. This was not because of the

characteristics of the prospective adult students, but because of the number of steps, various procedures, and people involved in the admissions process.

In addition, it became apparent that the staff training interventions were insufficient in and of themselves, without planned and deliberate follow-through to implement the desired changes. This led to consideration of measures that would help add a longitudinal dimension to the staff development process and also to a different approach to staff development for EDT #2.

Along with the above it was also recognized that with the number of interventions, with each addressing a specific aspect of the overall admissions process, that it would be easy for an intervention to take on a life of "its own" and not contribute to the overall change process. For this reason the concept of "innovation principle" was developed to provide a focus or overriding theme for the intervention process. It is intended that the innovation principle or goal be the organizing or orchestrating concept for directing the change process so that the changes sought by each intervention would be seen as an important part of an overall process of change. Individual changes were expected to occur in various parts of the admissions process and as the changes took hold and came together they would help achieve the innovation goal and constitute the improved admissions process.

Considerable assistance in conceptualizing its intervention process was derived for Hall and Hord's Intervention Taxonomy.[1] The Taxonomy defines the levels of the intervention process and describes appropriate activities for achieving what we call its innovation goal. The following is a description of the Intervention Taxonomy as adapted for use with the LLP:

Policy - The new or refined statements intended to govern institutional operation and to be achieved through interventions in the admissions process. These are to effect changes in admissions requirements, procedures, information and information delivery systems and staff roles and contacts with prospective students.

Game Plan - The overall strategy adopted to implement new policy. An Intervention Coordinating Committee is responsible for planning, assigning responsibility for specific interventions, scheduling activities, managing resources, etc.

Game Plan Component - A specific intervention is assigned to an Intervention Management Team. This team is responsible for specific planning for the implementation of their intervention including strategies for implementation, monitoring staff training, and evaluation.

Strategies - These represent the major events in the implementation of each intervention and may be the responsibility of individual members of the Intervention Management Team.

Tactics - Each strategy is made up of several tatics such as the preparation of agendas, announcements, conducting meetings, providing feedback, etc.

This classification structure was adapted as a framework for organizing thinking about the intervention process during work with the

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[1]Gene E. Hall and Shirley Hord. "Analyzing What Change Facilitations Do: The Intervention Taxonomy." Knowledge: Creation, Diffusion and Utilization, Vol. 5, No. 3, March 1984, pp. 275-307.

research sites and was subsequently used to some degree with the demonstration sites. It proved, however, to be more useful to the LLP staff than to school personnel probably because of this tendency for school personnel to think action rather than systems terms. This discovery represents an important area that has not been addressed in terms of an intervention and may represent a major barrier relating to institutional organization effectiveness in using the implementation of qualitative methodology and critical analysis as a way of doing business.

With respect to EDT #2 it was mentioned that the approach to staff development was changed. For example, the intervention design for Staff Development for EDT #2 was developed as a long term process, instead of as the point in time training session, as used for EDT #1. The EDT #2 staff development process covers about four years and is organized in three phases. The objective and activities for each of these phases are outlined in detail in the intervention design. The rationale is to provide opportunities for staff to become aware of alternate ways of looking at the teaching learning process; have opportunity to experiment with some of these new approaches; and then in the final phase to identify the most important and productive approaches to teaching-learning so that they can be included as part of staff hiring, development, and evaluation. The new conceptualization on intervention had matured considerably as a result of work completed in EDT #1 and EDT #2.

The Dissemination Process

The primary objective of the dissemination process was to inform

institutions and professionals regarding the research findings and the availability of the interventions. As this process evolved, however, it became apparent that in order to create the possibility for lasting change it would be necessary to not only inform prospective users, but to also transfer to them competency in understanding and using LLP concepts and knowledge. The FY 86 dissemination activities resulted, therefore, in the conducting of state-wide dissemination conferences within the AEL Region, establishing 11 demonstration sites and the transfer of competency for using LLP concepts to 33 resource people within the Network. The resource people are competent to assist other schools with the implementation and use of the interventions. Also to help ensure continuation of the LLP work arrangements have been made to transfer the focal point for the LLP Network from AEL to the Center for the Study of Higher Education (CSHE) at Memphis State University.

The LLP Network at the conclusion of the project is composed of representatives from two research and 11 demonstration sites, and four Boards of Regents; 33 resource people and 220 individuals who receive the LLP newsletter.

Other more specific observations and conclusions concerning the adult learner and institutional policy and procedures are provided as a part of the research summaries for EDT #1 and #2.

Appendix A

Abstracts of Project Documents

Technical Report FY 82-83
Institutional Selections and Description
Section I: Institutional Site Selection Process

The first scope of the Appalachia Educational Laboratory (AEL) Lifelong Learning Program (LLP) began with a selection process that resulted in two institutions--Ashland Community College and Southwest Virginia Community College--being chosen as research sites for the educational development study. The first of three sections of the technical report describes the criteria used for selection, the institutions considered, and the process followed in the selection.

The original pool of institutions considered for selection contained vocational-technical schools and community and technical colleges located primarily in areas within reasonable driving distance of AEL in Charleston, West Virginia. Based upon recommendations from a consultant who had extensive knowledge of the community colleges and vocational-technical institutions in the region, the following institutions were selected for on-site visits: Ashland Community College, Ashland, Kentucky; Hocking Technical College, Nelsonville, Ohio; Parkersburg Community College, Parkersburg, West Virginia; Southern West Virginia Community College, Logan, West Virginia; Southwest Virginia Community College, Richlands, Virginia; Washington Technical College, Marietta, Ohio; and Wytheville Community College, Wytheville, Virginia.

Information collected through the on-site visits was compiled and examined in light of the selection criteria, which was: (1) being within a reasonable driving distance to Charleston--all institutions were within three and a half hours one-way driving distance to Charleston; (2) having a rural location and student population--all institutions, with the exception of Parkersburg Community College, were located in predominantly rural areas and served rural populations; (3) having a balanced student body in terms of race and sex--all seven schools reported a small minority student population, which was representative of the region; (4) programs representative of the region--most community and technical colleges in the region offer certificate, associate in arts/sciences, and associate in applied science programs; (5) provisions of remedial (basic skills) instruction--all seven institutions offered remedial instruction in English and math; (6) institutional interest and commitment to LLP goals--all seven sites expressed interest in participating in the LLP; (7) willingness to collaborate with AEL during the study--all expressed willingness to collaborate; and (8) willingness to establish an advisory committee--all expressed willingness to establish advisory committees of staff and adult students.

A summary of data collected on the seven potential research sites is given in the technical report. Other factors considered important in making the selection were: (1) existence of an open admissions policy, (2) reasonable tuition compared with other institutions being considered, (3) existence of diagnostic preassessment, (4) a student body with sizable nontraditional adult composition, (5) comprehensive student records, (6) availability of counseling services and academic advisement, and (7) follow-up with noncompleters. These factors are discussed in the report, and specific conditions or reasons for not selecting the other five schools for the research sites are given.

Additional information considered significant in making the final site selections showed that Southwest Virginia Community College had the oldest mean age for full-time students (28). The college serviced a very rural area and provided extensive bus service to outlying areas. Ashland Community College had a large enrollment in remedial programs, and 50 percent of its students participated in career planning sessions. Orientation sessions were provided for both day and evening students, and the college also offered a number of programs designed for local employer needs. The pre-assessments administered by the college were considered to be positive selection factors.

In addition to meeting the general selection criteria, Ashland and Southwest Virginia Community Colleges were found to have significant comparative characteristics which would serve to strengthen the proposed research and make the combined areas more representative of the schools throughout the region. These colleges were considered to be representative of the public, postsecondary institutions in the region which emphasize one and two-year occupational preparation programs for adults. Southwest provides programs on a quarter basis to a very rural population while Ashland provides programs on a semester basis to a less isolated rural population.

Technical Report FY 82-83
Institutional Selections and Descriptions
Section II: Ashland Community College

Section II of this technical report provides a general description of Ashland Community College (ACC), one of the two institutions selected to participate in the Appalachia Educational Laboratory (AEL) Lifelong Learning Program (LLP). Information was obtained by review of institutional documents, informal discussion with students and staff, and informal observation.

Detailed information in the report describes the school's: (1) physical environment (location, service region, and campus layout); (2) human, social environment (establishment, purpose, organization, decision-making styles and lines of communication, faculty and faculty committees, student committees and clubs, student body, and student services); (3) educational programs (degree and certificate programs, non-degree and non-certificate programs, and developmental programs); and (4) information resources (student records, handbooks, college catalog, faculty handbooks, institutional studies, and other resources).

Ashland Community College is located in the city of Ashland, which is in the northeastern tip of the state of Kentucky and services a five-county area. The college, which is part of the University of Kentucky Community College System including 12 community colleges and one technical institute, began in 1938 as Ashland Junior College and merged with the University of Kentucky in 1957, providing the first two years of a baccalaureate system as well as programs to meet community needs.

According to the college catalog, "considerable emphasis is given to adult and continuing education programs designed to meet the needs of local citizens." The college's 1980 self study states that "the faculty believes learning includes the development of personal values and attitudes, acquisition and application of skills and knowledge, and the pursuit of lifelong learning with a spirit of inquiry."

By law, the Board of Trustees govern the University of Kentucky and the Community College System. The president is the chief administrative officer of the University of Kentucky and the vice president of the Community College System is the principal administrator of the system. An organizational chart showing how ACC operates within the University of Kentucky Community College System is given in the technical report. Also included are an organizational chart of the ACC divisions; a complete description of the organizational structure; and a description of the style, decision-making, and lines of communication.

Ashland Community College faculty are organized under Rules of the Senate of the University of Kentucky Community College System and the Rules of the Faculty of Ashland Community College. In the fall semester 1981 there were 54 full time faculty, 18 percent of whom had doctoral degrees and 52 percent masters degrees. Twenty percent were beyond the masters level.

Students are appointed to all ACC administrative committees except those related to faculty personnel. No dormitories are available since the college was designed for commuting students. An overview of the student development services is also included in the technical report.

The college operates year-round on a semester basis with a summer intersession and session. Fall 1981 enrollment showed a total of 1,572 students, of whom 51 percent were full time and 48 percent part time. Three percent of the students were members of a minority and the majority of the students were female (63 percent). Average age for full time students was 23; average age for part time students was 28.

Prior to registering, most students are encouraged to participate in a career planning conference. Eligible students are provided individual tutoring, counseling, and techniques in learning at no extra cost. The college offers three associate degrees as well as several non-degrees, non-certificate programs. The curricula for the associate of arts or science satisfy the University of Kentucky transfer requirements.

Highest enrollments in associate of arts and associate of science programs in fall 1981 were in computer science (43), accounting (59), and business administration (62). Enrollments in associate of applied science programs (technical programs) showed highest numbers in the nursing awaiting program (112), professional secretaryship (91), accounting technology (88), nursing associate (84), management technology (76), and civil engineering technology (58). The college does not offer certificate programs; these are offered in a vocational-technical school located in close proximity.

Included as appendices to Section II of the technical report are Recommendations Resulting from Ashland Community College's 1980 Self Study; Findings and Recommendations of a Study of Community College Education in Kentucky; and excerpts from the student services handbook.

Technical Report FY 82-83
Institutional Selections and Descriptions
Section III: Southwest Virginia Community College

This section of the technical report provides a general description of Southwest Virginia Community College (SVCC), one of the two institutions selected to participate in the Appalachia Educational Laboratory (AEL) Lifelong Learning Program (LLP). Information was obtained by review of institutional documents, informal discussion with students and staff, and informal observation.

Detailed information in the report describes the school's: (1) physical environment (location, service region, and campus layout); (2) human, social environment (establishment, purpose, organization, style and decision-making committees, student body, and student services); (3) educational programs (degree and certificate programs, non-degree and non-certificate programs, and development programs); and (4) information resources (student records and handbooks, college catalog and other faculty handbooks, curriculum/program guides, institutional studies, and other resources).

Southwest Virginia Community College, located on 100 acres in Tazewell County in the extreme western section of Virginia, is situated in a very rural, mountainous, picturesque setting. Studies indicate that this severely isolated area has the lowest level of adult educational attainment in Virginia and has the third highest dropout rate in the state.

Established in 1967 as a two-year institution of higher education, SVCC is part of the statewide system of community colleges operating under policies set by the Virginia State Board for Community Colleges and the local College Board. The school operates year-round on a quarter system and offers programs of instruction not extending more than two years beyond high school. Specific programs of instruction are described in the report.

The State Department of Community Colleges, operating under the State Board for Community Colleges, is responsible for the administration and supervision of all community colleges in Virginia. The local College Board serves as an advisory committee to the State Board of Community Colleges. Duties of the local College Board are listed in this report, and an organizational chart gives the college's administrative divisions headed by the president.

Faculty and administration at SVCC are made up of 85 persons, 59 of whom are male and 26 female. Sixty-three percent of the faculty have at least a masters but less than a doctoral degree. Fifteen percent have a doctoral degree. Faculty requirements, teaching loads, and a description of faculty committees are given in the technical report, including copies of the "Teaching Faculty Evaluation" and the "Virginia Community College System's Guidelines for Academic Preparation of Faculty."

Fall 1981 enrollment showed a total of 3,530 students, 57 percent of whom were male and 43 percent female. Thirty percent were enrolled full time and 70 percent part time. Average age for full time students was 28 and for part time students average age was 30. The largest number of students were in the AAS mining program (1,057).

A copy of the "1980-81 End-of-Year Summary Report of the Comparative Guidance and Placement Program" gives detailed descriptive information on 666 SVCC students who completed the instrument. In addition, summary tables are listed giving students' Comparative Guidance and Placement Program Ability Test and Interest scores for 1980-81. Copies of the SVCC Student Handbook give information on student clubs and services, and copies of the Faculty Advisement Handbook list "Student Services Staffing Responsibilities for 1981-82." The handbook also describes Project ACHIEVE, the government-funded support-services program available at no charge for eligible students.

The college's three types of two-year degree programs--Associate in Arts Degree, Associate in Science Degree, and Associate in Applied Science Degree--are described in the technical report along with their major fields of study. Certificates are offered in a number of programs which are generally non-degree and are of one year duration or less. Minimum requirements for Associate degrees are also listed.

The report includes institutional studies evaluating the orientation course conducted for fall 1981, an annual follow-up study of transfer students, and a "Survey of SVCC Graduates 1976-1980" which found that a majority of responding graduates rated their SVCC experiences good or superior.

Appendices to Section III of the technical report give copies of the table of contents of the SVCC catalog and faculty handbook for 1980-81. Copies of individual program progress sheets for SVCC programs are included, as well as copies of the "SVCC Survey of Area High School Juniors and Seniors," the "Student Activities Calendar for Winter '82," and a college admissions office newsletter, "SVCC Update."

Technical Report FY 82-83
Vocational Development Task #1
Making the Commitment to Vocational Training

The technical report describes the qualitative research methodology used to study adults at two community colleges--Ashland Community College, Ashland, Kentucky, and Southwest Virginia Community College, Richlands, Virginia--during the 1981-82 fall admissions period. First in a series of five Appalachia Educational Laboratory (AEL) Lifelong Learning Program (LLP) studies, this study focused on adults as they formulated a commitment to return to school. The purpose was to identify factors that facilitate and/or impede adults in making a commitment. Results were used as the basis for identifying and validating interventions designed to enhance facilitating factors and/or moderate the effect of impeding factors.

Principal investigators first observed the admissions process and talked informally with administrative staff, instructors, and students at both research sites. The technical report contains a summary of the procedures followed during the problem investigation phase which resulted in a list of barriers and supports adults perceived in relation to their making an initial commitment.

Two interview guides were developed for use with enrolled students and nonenrollees who began the admissions process but dropped out of school. Two interviewers, one male and one female, were selected at each site and given two days' training by a quantitative methodology consultant. The report describes the process used to select target adult student populations to be given private interviews at both schools. Registration cards and computer printouts were used to identify the enrolled student population which met the following criteria: (1) over 20 years of age, (2) enrolling for the first time, (3) having freshman status, (4) having no previous postsecondary education, and (5) enrolling in at least two classes or for more than four credit hours.

Following an initial telephone call, interviews were conducted in person by a same-sex interviewer at each school site. All interviews were audiotaped and transcribed verbatim. Using the typed transcript, responses to each interview question were summarized for each interviewee and then examined across all interviewees. The technical report presents the results of the interviews with the final sample population of 20 enrolled adults and 13 nonenrolled adults at the two research sites. Interview findings are presented by the interview topics which were covered in the interview guide. Topics are separated according to male and female, enrollee and nonenrollee. Factors perceived by the adults as either facilitating or impeding their commitment to enter vocational training are also summarized in the report. These consist of the personal, situational, or institutional characteristics mentioned as being related to making the decision whether or not to return to school. Interview data were summarized in terms of the basic categories of factors involved. Summaries were divided into two general areas that list factors that facilitated and impeded adults in making a commitment to return to school.

Interpretation of the data involved the following groups: (1) advisory groups at both research sites, (2) key counseling and admissions staff at both sites, (3) the LLP consortium group made up of the five additional schools included in the original pool of possible research sites, and (4) the LLP staff. The technical report describes the involvement of these groups in the prioritizing, categorizing, and collapsing of the impeding and facilitating factors generated from the adult interviews. Factors were first prioritized on the basis of their criticality and then on the basis of their amenability to interventions. Weighted scores for each factor were summed for the two groups at each school and the amenability weighted score for each factor was also calculated. The prioritized list of impeding and facilitating factors for each school and for both schools combined is given in the report.

Further interpretation, validation, and discussion of the critical factors by the LLP consortium group, the five schools other than the research sites, led to the conclusion that the factors and ratings were representative of those affecting adults at the other five institutions. Using a card sort technique, each consortium group member and LLP staff member grouped factors which they thought related to the same concept. A matrix was developed showing how the participants linked the factors together. Each factor was given an identification number based on how critical that factor had been rated: the lower the ID number, the more critical the factor. Factors were then collapsed into categories, resulting in the generation of six general facilitating and six general impeding categories listed by titles based on factors composing the categories.

Interpretation of the results provided the basis for the development of interventions designed to moderate impeding factors and enhance facilitating factors related to adults making a commitment to enter vocational training.

Technical Report FY 84
Educational Development Task #2:
Adults Managing Learning

The technical report describes all the research methods and results of Educational Development Task (EDT) #2 of the Appalachia Educational Laboratory (AEL) Lifelong Learning Program (LLP). The purpose was to collect and analyze data to identify factors that facilitate and impede the ability of adults to manage personal responsibilities, schedule time, and organize themselves to meet the initial courses in their programs of study.

During the problem investigation stage of the study in the fall of 1983, a target population of adults, enrolled for their first term of school at Ashland Community College (ACC) and Southwest Virginia Community College (SVCC), were selected based on specific criteria. The ACC target group, 189 adults entering school for the first time, consisted of 114 females and 75 males. The SVCC target population consisted of 154 adults, 101 of whom were female and 53 male.

A demographic analysis of the target population showed that the academic status of the target groups covered the full range of programs offered at each research site and that adults were engaged in a wide range of preparation options including 30 different classifications at ACC and 25 at SVCC. Specific enrollment data and credit hours taken by target groups are summarized and described in demographic charts showing a breakdown of courses taken by males and females in the target population.

Analysis of the academic status of target populations at both research sites at the end of the fall term showed that of the 397 adults who registered for classes 21 percent withdrew within the first several weeks and an additional 24 percent did not register for the next term. This represents a 45 percent noncompletion rate for EDT #2. Also, many adults who were part of the 55 percent survivor rate were marginal in successfully completing EDT #2 and were going on to EDT #3.

In order to analyze the learning behavior of the sample population during their first 12 weeks of school, the following instruments were used for collection of data: (1) institutional records, (2) personal interviews, (3) daily time logs kept by students for a one-week period, and (4) classroom observation logs used by LLP research staff to observe institutional activities and learner behavior in classes were target students were enrolled. By comparing data from these sources, an analysis was made of the factors that influence adults in their success or failure to manage the learning process during the first 10 or 12 weeks of college.

The technical report analyzes the results of personal interviews given sample adult students (19 females and 6 males at one site; 9 females and 12 males at the other site) and a small number of students (24) who registered and then withdrew from school during the early weeks of the term, or who never started classes. Enrolled students were asked a broad range of questions having to do with personal, family, financial, or institutional factors which might be contributing to either success or frustration in

their attempts to manage school. Emphasis was on determining specific factors which were facilitating or impeding their attempts to manage the learning process. Results show that barriers to managing the learning process were related to personal finances, home and family, transportation, classroom and institution, personal problems, school adjustment problems, and the absence of personal goals. Key factors to success seemed to be goal orientation, determination, a lack of serious financial difficulties, persistent but flexible study habits, sincere support by family, and a conscious effort by school personnel to support success.

Comparison of data from personal interviews, individual time logs, and first-quarter grades provided further analysis of factors that influence success or failure in managing learning. The technical report also presents findings based on anaysis of daily logs kept by sample adult students (28 female and 7 male) at both research sites for a one-week period. In addition, classroom observations made by LLP staff in selected classes where target groups were enrolled provided a framework for developing descriptions of typical learning situations and collecting data for the validation of findings. Further analysis was made of a sample population of adults (23 SVCC and 10 ACC) who applied for admission, registered, and then withdrew. Data were collected through the use of withdrawal questionnaires and interviews.

Results of the study showed that in order for learning to occur that leads to managing the learning process adults need to have greater personal involvement in the learning process itself. Four areas of adult learning that are amenable to intervention and can act either as facilitating or impeding factors are indicated: personal goals, school adjustment, classroom experience, and the institution. As a result of the study, targeted interventions were discussed with staff at both research sites and later during an intervention planning meeting with representatives of all seven schools participating.

Appendix B

Lifelong Learning Program Resource Directory

DRAFT

Lifelong Learning Program Resource Directory

Center Associates Network and Lifelong Learning Program Interventions and Resource People

September 1986

Center Associates Network
Center for the Study of Higher Education
College of Education
Memphis State University
Memphis, Tennessee 38152

Lifelong Learning Program
Appalachia Educational Laboratory
P.O. Box 1348
Charleston, West Virginia 25325

The project presented or reported herein was performed pursuant to one or more contracts and/or grants from the National Institute of Education, U.S. Department of Education. However, the opinions expressed herein do not necessarily reflect the position or policy of the Appalachia Educational Laboratory or the National Institute of Education, and no official endorsement by the Appalachia Educational Laboratory or the National Institute of Education should be inferred.

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INTRODUCTION

This Center Associates Network/AEL-Lifelong Learning Program (LLP) Resource Directory has been developed to assist Network Members in reviewing the LLP Interventions and finding competent individuals to assist them in the implementation. These interventions are the product of educational research conducted on adults in post-secondary education. The studies completed involve adults during the admissions process and during their first term in school. These studies are entitled Educational Development Task (EDT) #1: "Adults Making the Commitment to Return to School" and Educational Development Task (EDT) #2: "Adults Managing Learning." The first of these studies resulted in the development and validation of 15 specific interventions for Task #1. These are listed on the Chart on page 9 and are identified by title, steps in the admission process and target group. The "Research Summaries on the Educational Development of Adults," are also included as a source of information and presents a summary of Tasks # 1 and # 2.

A more detailed description of each intervention is provided in the Intervention Fact Sheets for Task # 1 on pages 19-33, and for Task # 2 on pages 39-43. A chart listing the demonstration sites and proposed interventions can be found on page 15. This Directory also provides the user with two charts, one for each EDT, showing the Resource People available to assist with each intervention. To use the Charts, identify the specific intervention of interest in the first column. The Resource people are listed across the top of the chart and an X will appear in the cell for each person available for that intervention. A biographical description of each resource person can then be found alphabetically in Section II of this Directory. Each biographical entry provides the name, contact information, background sketch, photograph, and list of interventions for which they are a resource.

The resource people have agreed to serve as consultants to other institutions, usually on a fee basis. The fee for their services is to be negotiated on an individual basis. The Center for the Study of Higher Education Associates Network will serve as a clearinghouse for network information and to assist institutions with long range planning for change related to the LLP.

RESEARCH SUMMARIES ON THE EDUCATIONAL DEVELOPMENT OF ADULTS

Making the Commitment to Return to School and Managing Learning

August 1986

Walter W. Adams
Lifelong Learning Program
Appalachia Educational Laboratory
Post Office Box 1348
Charleston, West Virginia 25325

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INTRODUCTION

Adults making the commitment to return to school and managing learning are the first two in a series of five Appalachia Educational Laboratory Lifelong Learning Program research studies of adult development. These studies are based upon a developmental stage conceptualization that covers postsecondary entry, matriculation, completion, and entry into employment. The studies reported here focus on adults during the admissions process and their initial period in school.

The educational development of adults was selected as the framework for research because although educational and vocational-technical training programs differ in terms of content, the developmental sequence adults experience as a result of education and training is regarded as more uniform and consistent. This conceptualization makes it possible to conduct research at a limited number of institutions and to develop and test interventions that will be potentially useful across a wider range of similar institutions and programs.

Adult development is defined in terms of Educational Development Tasks that describe the requirements adults must meet to be successful in entering and completing educational and vocational-technical training programs. Success for each educational development task is based upon satisfactory completion of preceding tasks and the ability to perform the higher level competencies required by the current task. The title for each task is expressed in terms of the "functions to be performed" by the learner. The sequence of tasks hypothesized for successful completion of postsecondary education and vocational-technical training is as follows: (1) making a commitment to return to school, (2) managing learning, (3) developing occupational competence, (4) planning for employment, and (5) becoming employed.

An educational development task involves the action and interaction of both personal and institutional variables. For the learner, this means integrating subject matter, including specific skills, with appropriate attitudes and values to meet the institutionally defined requirements for success in a specific educational or vocational program. Growth occurs through completing the requirements for each task and the readiness of the learner to move beyond the current task to the next one.

The following research summaries are on the first two educational development tasks.

RESEARCH SUMMARY

Adults Making the Commitment to Return to School

Appalachia Educational Laboratory's study of the educational development of adults focused on: (1) identifying adults' perceptions of the personal and institutional factors that facilitate and/or impede them in successfully completing the admissions process for entry into postsecondary education, and (2) developing and validating interventions that will enhance the facilitating factors and moderate the effect of the impeding factors affecting adults in making the commitment to return to school. This educational development task starts at the point of considering school as a vehicle for self-development and continues throughout the admissions process up to the point of registering and starting classes.

Research involved the use of qualitative research methodology and was initiated in September 1981 at two community colleges located in Kentucky and Virginia, with five additional schools in the region serving in an advisory capacity.

Basic research covered the following three phases: context analysis, problem identification, and problem specification. The context analysis involved: (1) institutional case studies to examine the roles and responsibilities of administrators, student services staff, academic advisors, and admissions and clerical staff in terms of their work with adults during admissions; (2) an in-depth look at admissions requirements and procedures and information resources with the associated information delivery systems; and (3) a sample of adults who completed and failed to complete the admissions process. Analysis of these data resulted in the preliminary identification of the facilitating and impeding factors to be examined during the problem investigation phase.

The problem investigation involved the development and validation of instruments and conducting formal interviews with adults in the fall of 1983. The sample included adults who made it though admissions and registered for classes and those who started but failed to complete the process. The analysis of these interviews resulted in identification of 101 specific facilitating factors and 93 impeding factors.

The problem specification resulted in identification of the critical factor categories and finalization of the Admissions Model that emerged from the case study work. These categories are shown in the following chart.

Relationship of Categories of Facilitating and Impeding Factors Affecting Adults Making a Commitment to Return to School

Facilitating Factor Categories	Impeding Factor Categories
Employment related motivators	
Financial assistance and improvement	Financial difficulties
Institutional information, services, and offerings	Lack of information and services
Institutional characteristics	Confusion/unfamiliarity with institutional processes
Personal motivators	Apprehensions about self
Encouragement from others	Handling multiple responsibilities
	Time management concerns

This phase involved an advisory group composed of adults, research site staff, and project advisory groups in both the analysis and interpretation of the research findings and in developing recommendations for interventions to enhance the critical facilitating factors and moderate the effect of the impeding factors affecting adults in making a commitment to return to school.

The results of this study highlight the importance of viewing: (1) commitment as the product of adults identifying, clarifying, and integrating personal values with knowledge about educational opportunities for achieving career goals; and (2) admissions as a learning process--the means for adults to transform more general interests in education and career enhancement into values and goals necessary in developing the commitment to return to school.

The remaining stages of the R & D process involved the design, development, and validation of the 15 interventions recommended during the problem specification phase. These interventions are organized in terms of the following major products. An Administrative Handbook for admissions program operations covering admissions information management, the reading level analysis of admissions documents, validation and interpretation of placement tests, and procedures for improving information delivery systems; a Staff Development Handbook for administrators, faculty, student services staff, and office personnel, an Audiovisual Information Development Guide for preparation of locally relevant information covering the application, academic advising, and registration processes for students, and an Educational Planning Course for delivery to adults prior to starting admissions. (See chart on the following page for listing of interventions by title, steps in the admission process, and target group.)

These interventions are designed for use with administrators, student services staff, academic advisors, admissions office and clerical staff, and adults. Others address changes considered necessary to improve the quality of information and information delivery systems; admissions procedures; and the management of admissions information. The overall objective of the intervention process is to develop institutional and staff capacity to promote adult learning during the admissions process.

AEL LLP INTERVENTIONS FOR EDUCATIONAL DEVELOPMENT TASK #1:
ADULTS MAKING THE COMMITMENT TO RETURN TO SCHOOL

Intervention Title	Steps in Admissions Process I	II	III	IV	V	Target Group*
Admissions Management Information Tracking System	*********	*********	*********	*********	*********	2
Validation of Placement Tests			*********	*********	*********	3,4
Toll-Free Telephone Access Number	*********	*********				1,2
Information Booth		*********	*********	*********	*********	1,2
Reading Level Analysis of Admissions Documents	*********	*********	*********	*********	*********	2,3,4
Educational Planning Resource Center	*********	*********	*********	*********		1,3,4
Staff Training: Research Findings	*********	*********	*********	*********	*********	2,3,4
Staff Training: Academic Advising/Counseling Staff		*********	*********	*********	*********	2,3,4
Staff Training: Adult Commitment	*********	*********	*********	*********	*********	2,3,4
Staff Training: Educational Planning Resource Center	*********	*********	*********	*********		2,3,4
Staff Training: Admissions Office and Support Staff	*********	*********	*********			5
Sound Slide - Application Process		*********	*********			1,3
Sound Slide - Academic Advisement Process			*********	*********		1,4
Sound Slide - Registration Process					*********	1,5
Educational Planning Course	*********	*********				1

*Target Group Code:
1 = Adults
2 = Administrators
3 = Student Services Staff
4 = Academic Advisors
5 = Office and Clerical Staff

RESEARCH SUMMARY

Adults Managing Learning

Qualitative research methodology was used during the 1982-84 fall terms to determine the factors that facilitate and/or impede adults in managing learning. Research was conducted at two community colleges located in Kentucky and Virginia. A sample of new adult students was selected for the study based upon their concentration in first term required courses. These students were observed in classroom learning situations, interviewed, and asked to complete daily activity logs. These data, from each of the three sources, were triangulated to identify the critical facilitating and impeding factors affecting their success in managing learning. In addition, case study methodology was used to identify and develop information on administrator, student services staff, and instructor roles as they relate to new students as well as on course syllabi; reading levels of textbooks and other instructional materials; utilization of instructional resources; and testing and grading policy and procedures.

The demographic findings show that of 397 target adults who registered for classes at both research sites, 21 percent withdrew within the first several weeks and an additional 24 percent did not register for the next term. This represents a 45 percent noncompletion rate. It should also be noted that of the 55 percent survivors, some of these adults were marginal in terms of having made a commitment to return to school (task 1) as well as meeting the requirements for completing task 2 before proceeding on to task 3.

Results support the view that institutional policy and practice involving governance, curriculum, and teaching are conceptualized in very general terms and function for the most part independently from clear assumptions about learning or consistent understanding of the learning process. In fact, it would not be understating the case to say that "learning is whatever follows teaching" and that teaching appears to be an arbitrary construct ranging in emphasis from a content to a student centered learning focus. The former and predominant condition appears to impose external and artificial constraints on adults in their developing the ability to manage learning and can result, except for unusually purposeful learners, in diffusing learning goals and externalizing one's sense of responsibility. In addition, adults who have not successfully completed the prior educational development task of Making the Commitment to Return to School appear to be dealing with both tasks simultaneously and incurred greater instances of failure in completing task 2.

Representatives of both research sites and the five consortium member institutions that serve in an advisory capacity to the project participated in the interpretation of the research findings and in selecting target areas for the development of interventions.

The outcome of the Intervention Planning Meeting resulted in the selection of four factor categories as the most critical. These categories come under more direct control of the institutions and represent facilitating and impeding factor categories most amenable to change. These basic factors are:

- Personal and career goals--sense of purpose for being in school.
- School adjustment--effective study and learning skills.
- Classroom experiences--teachers, instruction, and instructional materials.
- Institutional experiences--academic advising, counseling, placement, class size, and tutoring.

The factor categories that were not selected were regarded as not as directly amenable to change. These categories include the availability of income and funds, family support, and transportation; and unique personal characteristics and problems. These factor categories were rated lower for one or both of the following reasons.

- They represent concerns such as financial aid or transportation that could be handled during the admissions process and, therefore, addressed as part of Educational Development Task 1.
- They include factors such as unemployment, personal characteristics, and family support that are not the direct responsibility of institutions and can only be addressed indirectly through special counseling and support.

Interventions were proposed for these areas during the Intervention Planning Meeting but were not rated as priority areas for the design of interventions.

Target areas for intervention design were also selected by members of the advisory group. These represent areas regarded as the most important to enhance the effect of the facilitating factors and to moderate the effect of the impeding factors in adults developing the competence to manage learning. They are as follows.

- Orientation Program/Course Components for a one, two, or three credit hour course to facilitate educational and career planning, discovery of commitment, and management of learning.
- Staff Development Program for instructional staff on general learning concepts and learning related to specific disciplines to provide a more viable intellectual climate for the examination of teaching practice.

- Community Resources Component: Educational Planning Resource Center to describe expansion of the Educational Planning Resource Center (EPRC) to include community resources and provide guidelines and procedures for developing and utilizing a community resources component of an EPRC.

- Reading Level Analysis of Instructional Materials to aid staff in the selection and/or development of instructional materials.

- Progress Monitoring System to enable staff to identify students who may be having difficulty and provide information to academic advisors and student services staff to facilitate follow-through in providing special assistance when needed.

The highest level inference that can be made based upon this research is to affirm the theoretical construct that guided investigation. This affirmation is expressed through redefining the concept of lifelong learning to account, more explicitly, for the psychosocial nature of self-direction and to recognize the potential fragileness of self-directed learning in formal educational settings, particularly when such settings tend to regard learning as a mere epiphenomenon of teaching and encourage the displacement of less developed or sophisticated learner goals by course, program, and institutional goals. The revised definition of lifelong learning resulting from this study is as follows.

Lifelong or self-directed learning involves the exercise of personal initiative in organizing and developing self to meet the accepted challenges or requirements necessary to achieve one's goals. In formal educational settings, this occurs as learners are able to integrate course goals and content with their purposes for being in school and meet the requirements for success set by the educational institution and their individual programs of study, and course instructors.

LLP RESEARCH SITES

Ashland Community College
Ashland, Kentucky 41101

Southwest Virginia Community College
Richlands, Virginia 24641

LLP CONSORTIUM GROUP

Ashland Community College
Ashland, Kentucky 41101

Hocking Technical College
Nelsonville, Ohio 45764

Parkersburg Community College
Parkersburg, West Virginia 26101

Southern West Virginia Community College
Williamson, West Virginia 25661

Southwest Virginia Community College
Richlands, Virginia 24641

Washington Technical College
Marietta, Ohio 45750

Wytheville Community College
Wytheville, Virginia 24382

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DEMONSTRATION SITES AND PROPOSED INTERVENTIONS

COMMUNITY COLLEGES BY STATES	ADMINISTRATIVE INTERVENTIONS						STAFF TRAINING PACKAGES					SLIDE/TAPE PROGRAMS			ADULT COURSES
	Admissions Management Information Tracking System (ADMITS)	Validation of Placement Tests	Toll-free Telephone Access Number	Orientation Booklet	Reading Level Assessment Instrument	Educational Planning Resource Center	Research Findings	Academic Advising & Counseling Staff	Adult Commitment	Educational Planning Resource Center	Admissions Office & Support Staff	Application Process	Academic Advising Process	Registration Process	Educational Planning Course
VIRGINIA															
Wytheville Community College	F86	F86	F86	F86	F86	OP	C-5/86	C-5/86	C-5/86	C-9/86	C-5/86	F86	F86	F86	F86
New River Community College	F86		AF	F86	F86		C-5/86	C-5/86	S87		C-5/86	W86	W86	W86	
Mountain Empire Community College	F86	F86	F86	F86	F86	F86	C-5/86	C-6/86	F86	F86	C-5/86	F86	F86	F86	F86
Patrick Henry Community College	F86				F86	F86				F86	F86	F86	F86	F86	UC
KENTUCKY															
Hazard Community College	F86	F86		F88	OP	F86	F86	F87	F88	F87	F86	F88	F88	F88	F86
Southeast Community College	F86	F86	UC	F86	F86	F86	S87	S87	S87	F86	S87	F86	F86	F86	F86
Somerset Community College	S87	F87	UC	F86	UC	F86	F86	S87	S87	UC	S87	F88	F88	F88	F86
WEST VIRGINIA															
Parkersburg Community College	F88	F86	W86		F86	AF	F86	W86	W86	W86	W86	F86	UC	UC	AF
Southern West Virginia Community College	F86	F86		F86	F86	F86	C-5/86	C-5/86		F86	F86	F86	F86	F86	F86
TENNESSEE															
Roane State Community College*			F86	F86	F86						F86				
Tri-Cities State Technical Institute	OP			F86	F86	F/W86	F86	F86	F86	F86	F86			OP	F86

*Special EDT #2 Staff Training Program conducted April 24, 1986

Legend
F - Fall
W - Winter
S - Spring
C - Completed
OP - Already Operational
UC - Under Consideration
AF - Alternate Form

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LLP-Contact Persons for Research and Demonstration Sites

Research Sites

Ashland Community College
1400 College Drive
Ashland, Kentucky 41101
606/329/2999
Robert Goodpaster, Director

Southwest VA Community College
Richlands, Virginia 24641
703/964-2555
Harold VanHook, Dean of Inst.
Armand Opitz, Dean, Student Development Services

Demonstration Sites

Hazard Community College
Hazard, Kentucky 41701
606/436-5721
Harrison Fields, Assistant Director

Mountain Empire Community College
Big Stone Gap, Virginia 24219
703/523-2400
Linda Kilgore, Dean of Academic and Student Services

New River Community College
P. O. Drawer 1127
Dublin, Virginia 24084
703/674-4121
Doug Warren, Dean of Instruction and Student Services

Parkersburg Community College
Parkersburg, West Virginia 26101
304/424-8000
Jan Morris, Student Services Counselor

Patrick Henry Community College
P. O. Drawer 5311
Martinsville, Virginia 24115
703/638-8777
Colin Ferguson, Dean of Academic and Student Development

Roane State Community College
Harriman, Tennessee 37748
615/354-3000
Eileen Sheahan, Student Retention

Somerset Community College
Somerset, Kentucky 42501
606/589-2145
Ernest Cronan, Assoc. Director
Alvis Brown, Counselor Recruitment Coordinator

Southeast Community College
Cumberland, Kentucky 40823
606/589-2145
Anthony Newberry, Associate Director

Southern WV Community College
Logan, West Virginia 25601
304/752-5900
James Cox, Director of Institutional Res. & Grants

Tri-Cities State Technical Institute
Blountville, Tennessee 37617
615/323-3191
Sally Essin, Counseling and Assessment

Wytheville Community College
Wytheville, Virginia 24382
703/228-5541
Kay Kincer, Assistant Director of Instructional Services

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EDUCATIONAL PLANNING COURSE

Educational Planning Course. 33

ADMISSIONS MANAGEMENT INFORMATION TRACKING SYSTEM (ADMITS)

Reference: The Admissions Process: Administrative Handbook (pages 9-86)

Target Group: Administrative and clerical staff responsible for maintaining contacts with prospective adult students and for handling and processing admissions information.

Purpose: To improve institutional responsiveness to prospective adult students and the quality and relevance of services provided to such students during all phases of the admissions process.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the installation, use, and evaluation of the ADMITS system.
- Enter names and addresses of all students making contact with school relative to admissions. This includes prospective students using the toll-free access number, information booth, and other access means.

Facilities and Equipment: See pages 11-12.

Direct Costs:
- Materials:
  - Hardware
  - Software
  - Continuous feed paper
  - Letterhead paper
  - Address labels

Indirect Costs: Staff for data entry, report generation, and supervision.

GUIDELINES FOR THE VALIDATION AND INTERPRETATION OF TESTS USED IN ACADEMIC ADVISING AND PLACEMENT OF ADULT LEARNERS

Reference: The Admissions Process: Administrative Handbook (pages 87-107)

Target Group: Direct - College personnel responsible for testing and test interpretation for placement of adult students into programs and courses.

Purpose: To improve adult learning and choice of programs and courses.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the development and use of the placement validities and interpretation materials and processes.
- Include student services staff members and math department on intervention management team.
- Use with ACT and College Board tests to develop local validity for program and course placement.
- Use with local or nationally standardized tests to develop local validity for placement in programs and courses.

Facilities and Equipment: See pages 105-107.

Direct Costs:
- Materials:
  - Three worksheets for organizing and processing test data.

Indirect Costs:
- Staff time for intervention management team.
- Staff time for validation data development and analysis.
- Student services staff time to develop interpretation materials and procedures.

TOLL-FREE TELEPHONE ACCESS NUMBER

Reference: The Admissions Process: Administrative Handbook (pages 109-129)

Target Group: Prospective adult students in the college's service area.

Purpose: To provide direct access to information and advice for adults who may be reluctant to initiate contact with the college through the mail or a visit to campus.

Recommended Use:
- Appoint an intervention management team to plan, coordinate, operate, and evaluate the effectiveness of the toll-free telephone access service.
- Enter each inquirer's name and address into the ADMITS system.
- This service should be used in conjunction with a comprehensive marketing scheme to draw attention to the college and the telephone as an easy access mode.
- Operate telephone service during recruiting periods associated with school terms.

Facilities and Equipment: See pages 110-112.

Direct Costs:
- Telephone installation and use charges.
- Log sheets.

Indirect Costs:
- Staff training and supervision.
- Staff to operate phone service.

INFORMATION BOOTH

Reference: The Admissions Process: Administrative Handbook (pages 131-143)

Target Group: Prospective adult students who visit the college campus to explore the possibility of starting school and who may be engaged in any of the five steps of the admissions process.

Purpose: To provide prospective adult students with a centrally located easy-to-access resource to obtain information and directions related to all steps of the admissions process.

Recommended Use:
- Appoint an intervention management team consisting of professional and clerical staff to develop, use, and evaluate the information booth.
- Use the Staff Training Package on Admissions Office and Support Staff (see Admissions Process: Staff Development Handbook, pages 234-278) to train staff to operate the information booth.
- Operate booth starting several weeks before registration and continue through registration up to the end of late registration.
- Provide a variety of information resource materials for distribution through the information booth.
- Set up and make appointments directly from information booth for counselor and academic advising conference and interview.
- Develop and use audiovisual information on application, academic advising, and registration processes directly at information booth (see Admissions Process: Audiovisual Information Development Guide).
- Use work study students or volunteers to operate booth.

Facilities and Equipment: See pages 132-139.

Direct Costs:
- Installation of telephone extension.
- Preparation of information booth sign.

Indirect Costs:
- Staff to train and supervise booth operation.
- Personnel to operate booth and provide services.

READING LEVEL ANALYSIS OF ADMISSIONS DOCUMENTS

Reference: The Admissions Process: Administrative Handbook (pages 145-202)

Target Group: Director of admissions, public information officers, financial aid officers, and student services staff.

Purpose: To develop, use, and evaluate the effectiveness of written information provided to prospective students during the admissions process.

Recommended Use:
- Appoint an intervention management team to plan, coordinate, prepare/review, and evaluate admissions information.
- Utilize format, layout, and visuals to make information announcements more attractive and interesting.
- For larger documents randomly selected passages to be included in analysis.
- Review Leffel, Linda G., Designing Brochures for Results, order from Learning Resources Network (LERN), 1211 Thurston, Manhattan, Kansas 66502.

Facilities and Equipment:
- See page 147.
- Apple II microcomputer (48K minimum capacity).
- Printer.

Direct Costs:
- Materials:
- Software: School Utilities, Volume 2, Readability Diskette #749, $30.00; and Support Booklet #A749, $6.50; published by Minnesota Educational Computing Consortium, Distribution Office, 2520 Broadway Drive, St. Paul, Minnesota 55113-5199.

Indirect Costs:
- Staff time for preparation of written materials.
- Staff time for conducting reading level analyses.

EDUCATIONAL PLANNING RESOURCE CENTER (EPRC)

Reference: The Admissions Process: Administrative Handbook (pages 203-301)

Target Group: Educational resource managers responsible for setting up, maintaining, and using an EPRC.

Purpose: To help academic advisors and student services staff provide adults with information and assistance in conducting career exploration activities with particular reference to selection of courses and majors.

Recommended Use:
- Assist individuals in assessing and understanding their interests, temperaments, and aptitudes.
- Help individuals use available resources to achieve their goals.
- Promote career planning and decision-making activities.
- Provide a delivery system for career counseling activities.
- Foster the integration of career development activities into classroom instruction.
- Support educational and occupational exploration and occupational placement activities conducted as part of the instructional or student services programs.

Facilities and Equipment: See page 230.

Direct Costs:
- Personnel:
  - Operational use of outside help for setting up EPRC (average time estimated at 120 man hours).
- Materials:
  - Career Information System Start-Up Set of Materials - order from Bennett-McKnight Publishing Company (See cost breakdown sheet).
  - Materials to be furnished by installer.

Indirect Costs:
- Staff members on planning committee to assist with plans for the installation and utilization of the EPRC.
- Staff salary for person responsible for EPRC.

STAFF TRAINING PACKAGE: RESEARCH FINDINGS

Reference: The Admissions Process: Staff Development Handbook (pgs. 9-84)

Target Group: Administrators, faculty, academic advisors, and student services staff working with adults during admissions.

Purpose: Provide participants with a conceptual framework for understanding adult commitment and the factors that facilitate and/or impede adults in making the commitment to return to school.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- This training package should be delivered ahead of all other LLP training packages.
- Use a qualified outside person or consultant to deliver the training.
- If this training package and Academic Advising and Counseling Staff are to be delivered the same day, it would be better to use two different consultants.
- The best time to deliver this training package is prior to the start of school for the fall or spring term.

Facilities and Equipment: See pages 12-13.

Direct Costs:
- Personnel:
  - Consultant for three days, two days preparation and one day for the training session.
  - Consultant travel and expense.
- Materials:
  - Transparencies (seven).
  - Handouts (six) x number of participants.

Indirect Costs:
- Staff for workshop planning, coordination, and preparation of evaluation report.
- Staff salaries for one-half day (three hours) for workshop participants.

STAFF TRAINING PACKAGE: ACADEMIC ADVISING AND COUNSELING STAFF

Reference: The Admissions Process: Staff Development Handbook (pgs. 85-140)

Target Group: Academic advisors and student services staff working with adults during admissions as well as administrators responsible for these services.

Purpose: To help professional staff become aware of the factors that affect adults in making the commitment to return to school and help establish the concept of admissions as a learning process.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- This training package should follow the delivery of the Staff Training Package on Research Findings.
- Use a qualified outside person or consultant to deliver the training.
- If this training package and Research Findings are to be delivered the same day, it would be best to use two different consultants.
- The best time to deliver this training package is prior to the start of school for the fall or spring term.

Facilities and Equipment: See page 90.

Direct Costs:
- Personnel:
  - Consultant for three days, two days preparation and one day for the training session.
  - Consultant travel and expenses.
- Materials:
  - Transparencies (six).
  - Handouts (four) x number of participants.

Indirect Costs:
- Staff for workshop planning, coordination, and preparation of evaluation report.
- Staff salaries for one-half day (three hours) for workshop participants.

STAFF TRAINING PACKAGE: ADULT COMMITMENT

Reference: The Admissions Process: Staff Development Handbook (pages 141-192)

Target Group: Administrators, faculty, academic advisors, and student services staff responsible for working with adults during admissions.

Purpose: To present the concept of adult educational development using levels of commitment identified during the study of task #1 and to help target group become more sensitive to the varying levels of commitment experienced by adults.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- This training package should follow the delivery of the Staff Training Package on Research Findings.
- Use a qualified staff person or consultant to deliver the training.
- This training package can be delivered prior to school in the fall or at an appropriate time during the school term.

Facilities and Equipment: See pages 144-145.

Direct Costs:
- Personnel:
  - If a consultant is used, allow two days, one for preparation and one for delivery of the training session. Include also travel and expenses for consultant.
- Materials:
  - Transparencies (five).
  - Handouts (ten) x number of participants.

Indirect Costs:
- Staff for workshop planning, coordination, evaluation, and follow-up.
- Staff salaries for one-half day (three hours) for workshop participants.

STAFF TRAINING PACKAGE: EDUCATIONAL PLANNING RESOURCE CENTER

Reference: The Admissions Process: Staff Development Handbook (pages 193-234)

Target Group: Administrators, faculty, academic advisors, and student services staff responsible for working with adults during admissions.

Purpose: Provide faculty, academic advisors, and student services staff with information resources to assist adults in developing and articulating their educational and career plans.

Recommended Use:
- This package is dependent upon the availability of selected information resource materials. See Appendix B (pages 227-228) and The Admissions Process: Administrative Handbook (pages 203-299).
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- This training package should follow the delivery of the Staff Training Package on Research Findings.
- Use a qualified staff person or consultant to deliver the training.
- This training package can be delivered prior to school in the fall or at an appropriate time during the school term.

Facilities and Equipment: See pages 196-198.

Direct Costs:
- Personnel:
  - If a consultant is used allow two days, one for preparation and one for delivery of the training session. Include also travel and expenses for consultant.
- Materials:
  See pages 197-198.

Indirect Costs:
- Staff for workshop planning, coordination, evaluation, and follow-up.
- Staff salaries for one-half day (three hours) for workshop participants.

STAFF TRAINING PACKAGE: ADMISSIONS OFFICE AND SUPPORT STAFF

Reference: The Admissions Process: Staff Development Handbook (pages 235-278)

Target Group: All admissions supervisors (nonprofessional), clerical workers, division or department secretaries, business office and bookstore clerks, and switchboard operators.

Purpose: To increase the empathy, understanding, and motivation of admissions and clerical personnel for helping and encouaraging prospective adult students.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- This training package should follow the delivery of the Staff Training Package on Research Findings.
- Use a qualified staff person or consultant to deliver the training.
- This training package can be delivered prior to school in the fall or at an appropriate time during the school term.

Facilities and Equipment: See pages 238-239.

Direct Costs:
- Personnel:
  - If a consultant is used allow two days, one for preparation and one for delivery of the training session. Include also travel and expenses for consultant.
- Materials:
  - Handouts (five) x number of participants.

Indirect Costs:
- Staff for workshop planning, coordination, evaluation, and follow-up.
- Staff salaries for one day for workshop participants.

THE APPLICATION PROCESS SOUND SLIDE/TAPE PROGRAM

Reference: The Admissions Process: Audiovisual Information Development Guide (Appendix A: Ashland Community College Application Process)

Target Group: Adult students in steps two and three of the admissions process (for Admissions Model see Admissions Process: Staff Development Handbook, page 117) and admissions office staff (both professional and nonprofessional).

Purpose: To provide an overview of steps involved to help students gain an understanding of the application process and to provide them with an orientation to facilities and staff.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- Groups of students at steps 2-3 of the admissions process. This presents an opportunity for a discussion and question and answer session.
- Individuals who come in before the scheduled time or who show up the first day of class to be admitted. It may also be used on an as-needed basis with prospective students.
- Faculty as an orientation to the application process.
- Clerical staff as in-service for new staff in the office that deals with the application process. It serves as an orientation to part of their jobs, what they will be dealing with, and how it fits into the total process.
- Off-campus meetings with prospective students.

Facilities and Equipment: See page 10.

Direct Costs:
- Personnel:
  - If institution does not have an audiovisual department, will need to hire individual to photograph and do sound recordings.
- Materials:
  - Film and developing.
  - Cassette tapes.
  - Carrousel trays.

Indirect Costs:
- Staff time for one staff member to be project leader.
- Admissions staff personnel to develop script and other staff members to react.
- Staff in audiovisual department for sound recordings.

THE ACADEMIC ADVISEMENT PROCESS SOUND SLIDE/TAPE PROGRAM

Reference: The Admissions Process: Audiovisual Information Development Guide (Appendix B: Ashland Community College Academic Advisement Process)

Target Group: Adult students in steps three and four of the admissions process (for Admissions Model see Admissions Process: Staff Development Handbook, page 117), and admissions office staff and faculty (both professional and nonprofessional).

Purpose: To provide an overview of steps involved to help students gain an understanding of the academic advisement process and to provide them with an orientation to facilities and staff.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- Groups of students at step 4 of the admissions process. This presents an opportunity for a discussion and question and answer session.
- Individuals who come in before the scheduled time or who show up the first day of class to be admitted. It may also be used on an as-needed basis with prospective students.
- Faculty as an orientation to academic advisement process.
- Clerical staff as in-service for new staff in the office that deals with the academic advisement process. It serves as an orientation to part of their jobs, what they will be dealing with, and how it fits into the total process.
- Off-campus meetings with prospective students.

Facilities and Equipment: See page 10.

Direct Costs:
- Personnel:
  - If institution does not have an audiovisual department, will need to hire individual to photograph and do sound recordings.
- Materials:
  - Film and developing.
  - Cassette tapes.
  - Carrousel trays.

Indirect Costs:
- Staff time for one staff member to be project leader.
- Admissions staff personnel to develop script and other staff members to react.
- Staff in audiovisual department for sound recordings.

THE REGISTRATION PROCESS SOUND SLIDE/TAPE PROGRAM

Reference: The Admissions Process: Audiovisual Information Development Guide (Appendix C: Ashland Community College Registration Process)

Target Group: Adult students in step five of the admissions process (for Admissions Model see Admissions Process: Staff Development Handbook, page 117) and admissions office staff and faculty (both professional and nonprofessional).

Purpose: To provide an overview of steps involved to help students gain an understanding of the registration process and to provide them with an orientation to facilities and staff.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- Groups of students at step 5 of the admissions process. This presents an opportunity for a discussion and question and answer session.
- Individuals who come in before the scheduled time or who show up the first day of class to be admitted. It may also be used on an as-needed basis with prospective students.
- Faculty as an orientation to the registration process.
- Clerical staff as in-service for new staff in the office that deals with the registration process. It serves as an orientation to part of their jobs, what they will be dealing with, and how it fits into the total process.
- Off-campus meetings with prospective students.

Facilities and Equipment: See page 10.

Direct Costs:
- Personnel:
  - If institution does not have an audiovisual department, will need to hire individual to photograph and do sound recordings.
- Materials:
  - Film and developing.
  - Cassette tapes.
  - Carrousel trays.

Indirect Costs:
- Staff time for one staff member to be project leader.
- Admissions staff personnel to develop script and other staff members to react.
- Staff in audiovisual department for sound recordings.

EDUCATIONAL PLANNING COURSE

Reference: Educational Planning Course (Instructor's Guide and three Student Handbooks)

Target Group: Prospective adult students to be contacted through continuing education, community agencies such as JTPA, libraries, civic organizations, halfway houses, employment agencies, etc., and those in step two of admissions process (for Admissions Model see Admissions Process: Staff Development Handbook, page 117).

Purpose: To assist adults in building self-confidence, exploring their ability to do well in an educational setting, and in organizing their thoughts about their interests and abilities related to educational and career planning.

Recommended Use:
- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- Course should be preceded with intense marketing campaign.
- Requires approximately 20 contact/class hours for delivery.
- Requires career and occupational information resources.
- Accommodates class size of 10-20 people.
- Student fee recommended to cover costs of instructor and course materials.

Facilities and Equipment: See Instructor's Guide, pages 17-18, 37, and 47.

Instructor Qualifications/Recommendations: See Instructor's Guide, pages 11-13.

Information Resources: Access to EPRC (see Admissions Process: Administrative Handbook, pages 203-301) /or/ curriculum support materials (see Instructor's Guide, pages 18, 37, and 47-48).
- Worker Trait Group Guide, 15 copies
- Dictionary of Occupational Titles, 5 copies
- Guide to Occupational Exploration, 1 copy
- CIS Guide, 1 copy
- Filmstrips, 7
- Access to occupational information resources

Direct Costs:
- Instructor fee for 20 hours
- Materials:
  - Instructional materials - participant workbooks (photocopy) one per student
    - Module A, 70 pages, spiral bind
    - Module B, 20 pages, spiral bind
    - Module C, 27 pages, spiral bind
  - 100 Occupational Summary Sheets (photocopy both sides)

Indirect Costs: Staff for course marketing, supervision, and preparation of evaluation report.

Center Associates Network
Lifelong Learning Program
Task #1: Adults Making the Commitment to Return to School

RESOURCE PEOPLE AND INTERVENTIONS

		Resource People																																
		Walter Adams	Dan Bailey	Sandra Barker	Elsbeth Barnett	Patricia Beavers	Michael Bobolia	Pamela Braden	Arthur Chickering	Chuck Claxton	James Cox	Virginia Gordon	Jane Gray	Stephen Hamilson	Bobby Horton	George Johnson	Kay Kincer	Ann Lynch	Jan Morris	Pat Murrell	Cheryl Myers	Armand Opitz	Bonnie Prince	Mary Richmond	Norma Roberts	Eugene Schoch	Eileen Sheahan	Phyllis Stowers	Todd Strohmenger	Russell Thomas	Harold Van Hook	David Winefordner
	General Consultant for the Long-Range Institutional Planning on Adult Learning	X							X		X			X																			
Administrative Interventions	Admissions Management Information Tracking System (AMIIS)					X																						X					
	Validation of Placement Tests	X		X					X		X																						
	Toll-Free Telephone Access Number	X				X					X											X					X						
	Information Booth	X									X										X						X						
	Reading Level Analysis of Admissions Documents	X				X					X											X					X						
	Educational Planning Resource Center	X			X		X				X				X												X						X
Staff Training Packages	Research Findings	X		X			X		X	X	X	X				X		X	X	X			X		X	X	X			X			
	Academic Advising and Counseling Staff	X		X			X		X	X	X	X				X	X	X	X	X	X	X	X		X	X	X			X			
	Adult Commitment	X		X			X		X	X	X					X	X	X	X	X	X		X		X	X	X			X			
	Educational Planning Resource Center	X			X		X				X	X	X		X	X										X	X		X				X
	Admissions Office and Support Staff			X			X	X									X		X		X		X	X	X	X	X	X	X			X	
Slide/Tape Programs	Application Process	X									X																	X						X
	Academic Advising Process	X									X										X							X						X
	Registration Process	X									X																	X						X
Adult Course	Educational Planning Course	X	X		X				X		X	X	X		X	X					X							X						

LISTING OF TASK #2 INTERVENTIONS

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Professional Development.	40
Reading Level Analysis of Instructional Materials	42
Progress Monitoring System.	43
Community Resources Component of Educational. . . . . Planning Resource Center	44

ORIENTATION PROGRAM

Reference: Lifelong Learning Program, Orientation Program, Appalachia Educational Laboratory, Charleston, West Virginia, June, 1986

Target Group: New students during their first term in school.

Purpose: The Orientation course design provides information and recommendations for developing a one, two, or three credit hour course for all students entering school to provide them with an opportunity to develop language and concepts to clarify and express their goals for being in school, to understand their own educational and career development, develop career planning and decision-making skills, and identify and utilize resources available to help them successfully manage their own learning.

Recommended Use:

- Appoint an intervention management team to plan and coordinate the delivery, evaluation, and follow-up for this intervention.
- Course should be required for all incoming students and enrollment in different sections of the course should be based upon major selected and undecided status.
- Requires support of a well organized and up-to-date career and educational information resource center (see Task #1 intervention: EPRC-Fact Sheet, page 24).

Direct Costs:

- Instruction for Orientation Course (one, two, or three credit hours).
- Reproduction of instructional materials (NOTE; Work Activities Checklist now off copyright and may be locally reproduced).

Indirect Costs:

- Classroom facilities.
- Increased use of support services.

PROFESSIONAL DEVELOPMENT

Reference: Lifelong Learning Program, Professional Development, Appalachia Educational Laboratory, Charleston, West Virginia, July, 1985

Target Group: Post secondary school administrators and professional staff including faculty, academic advisors, and student service staff.

Purpose: To raise the level of professional awareness and understanding regarding learning and to create conditions favorable for individual instructors, academic advisors, and student service staff to examine and develop their teaching, advising, and counseling performance. To promote learning and to help establish more relevant policy and practice for promoting adult learning.

Recommended Use:

- Appoint a staff member to serve as project director for this staff development program.
- Appoint an intervention management team to work with the Project Director to plan and coordinate the professional development program.
- This intervention is designed for use over a three-four year period and aims at the progressive identification, use, adoption, and institutionalization of improved concepts regarding the teaching-learning process. The program is recommended in three phases involving (1) planning (pgs. 3-7); (2) problem identification (pgs. 7-9); and institutionalization phases (pgs. 9-10). The intervention design provides the specific objectives and recommended activities for each of these phases. Consulting activities will be useful for the following aspect of the intervention process:

  1. Utilize a general consultant on the overall development and organization of this intervention plan and process, especially in looking at the LLP research process and findings and setting up Phase I, Planning.

  2. Educational Development of Adults--to present recent research and theory on educational development, learning, cognitive development, and teaching such things as reasoning, thinking, creativity, etc.

3. Kolb Learning Styles--to administer and interpret the Kolb Learning Styles Inventory (LSI) to post secondary faculty and student services staff and demonstrate how the LSI theory can be applied to counseling and curriculum design, planning, and instruction.

4. Perry Scheme--to explain and assist faculty and student services staff in applying Perry's concepts on the Intellectual and Educational Development of College students to the design and evaluation of counseling and instruction.

5. Evaluation of Learning--to assist faculty and student services staff in shifting the focus from learning of content material to improved thinking and reasoning and to become more sensitive to educational development issues in curriculum design, implementation, and evaluation.

Facilities and Equipment:

- No special facility or equipment is needed.

Direct Costs:

- Costs for reduced teaching level for project director.
- Consultants to assist in the five areas specified above.
- Consultants during Phase I for planning and Phase II to introduce alternative concepts of learning, educational development, and the evaluation of learning.

Indirect Costs:

- Staff team to participate in planning and exploring the applications of improved learning concepts in their subject area.

READING LEVEL ANALYSIS of INSTRUCTIONAL MATERIALS

Reference: Lifelong Learning Program, Reading Level Analysis of Instructional Materials,
Appalachia Educational Laboratory
Charleston, West Virginia
August, 1985

Target Group: College Faculty and Staff.

Purpose: To aid college faculty and staff in the selection of textbooks, the development of instructional materials, and/or adapting instructions to accommodate use of instructional materials of differing levels of reading difficulty.

Recommended Use:

- Appoint an intervention management team to provide leadership in planning, coordinating, and evaluating the reading level analyses of of instructional materials intervention.
- Use the three phase implementation strategies presented in pages 6-8 of the guide.
- If the MECC software package recommended in the page 2 footnote is no longer available from MECC. Available in Virginia through:

  Joycefaye W. Hardy
  Supervisor of Industrial Technology
  Virginia Department of Education
  P. O. Box 60
  Richmond, VA 23216
  (804) 225-2855

- An alternative version is also available entitled Readability Formulas and runs on Apple 11/11&/11e, 48K, 5" disk drive, catalog No. 290AP, for $49.00 or $59.00 with backup diskette. This may be ordered from:

  Encyclopedia Britannica
  Educational Corporation
  425 North Michigan Avenue
  Chicago, IL 60611

Direct Costs:

- MECC or Encyclopedia Britannica Software package.

Indirect Costs:

- None

Reference: Lifelong Learning Program, Progress Monitoring System (PMS)
Appalachia Educational Laboratory
Charleston, West Virginia
August, 1985

Target Group: All students.

Target group and rationale--The adult learning experience can be enhanced by the PMS because it will enable counselors, academic advisors, instructors, and administrators to monitor student progress and contact students who are having difficulty in school. The system will be designed to report on exceptions, i.e., only those students experiencing difficulty in meeting the educational objectives for the courses they are enrolled in. Once the fact that a student is having difficulty is noted, appropriate action can be taken to help resolve the difficulty. If timely assistance is provided, the student may be able to resolve or overcome the difficulty and succeed in school.

Purpose: To aid students having difficulty in managing learning by enabling counselors, academic advisors, instructors, and administrators to monitor student progress and contact students who are having difficulty in meeting the educational objectives for the courses they are enrolled in.

Facilities and Equipment:

- No special facility or equipment needed.

Direct Costs:

- LLP consultant for installation of PMS.
- Equipment not already available at institution.

Indirect Costs:

- Staff training on use of PMS.
- Clerical time for data entry and information distribution.

COMMUNITY RESOURCES COMPONENT OF EDUCATIONAL PLANNING RESOURCE CENTER

Reference: Lifelong Learning Program, Community Resources Component of Educational Planning Resource Center (EPRC)
Appalachia Educational Laboratory
Charleston, West Virginia
August, 1985

Target Group: Faculty, academic advisors, student service staff, and students.

Purpose: To provide instructions for the expansion of the Educational Planning Resource Center (EPRC) to include a code range of community resources; to provide guidelines and procedures for developing and utilizing a community resource component of an EPRC; and to present a model for integrating educational and career planning into the curriculum.

Recommended Use:

- Appoint an intervention management team to plan, coordinate, and evaluate intervention implementation and progress.
- Install basic EPRC (EDT #1 Intervention Admissions Process: Administrative Handbook (pgs. 203-301).
- Conduct staff training on use of EPRC (the Admissions Process: Staff Development Handbook (pgs. 193-234).
- Develop concept and practice of using beginning course for every major or program area to involve students in occupational exploration.
- Engage intervention management team in conducting their phase of intervention implementation (pgs. 15-18).
- Plan, if possible, to enter community resource data base into a micro or mini computer for more efficient information management.

Direct Costs:

- Coordination for Community Resource Information System.

Indirect Costs:

- None

Center Associates Network, Lifelong Learning Program
Task #2: Adults Managing Learning

RESOURCE PEOPLE AND INTERVENTIONS

	Resource People																							
	Walter Adams	Lysbeth Barnett	Ronnie Bartley	Patricia Beavers	Arthur Chickering	Chuck Claxton	James Cox	Rob Goodpaster	Virginia Gordon	Stephen Hamilton	Bobby Horton	Kay Kincer	Ann Lynch	Pat Murrell	Cheryl Myers	Bonnie Prince	Norma Roberts	Eugene Schoch	Eileen Sheahan	Phyllis Stowers	Todd Strahmenger	Russell Thomas
General Consultant for the Long-Range Institutional Planning on Adult Learning	X				X		X			X													
Professional Development Consultant for the Intervention Process	X				X	X	X	X				X		X	X	X	X	X					
Professional Development Consultant for the Educational Development of Adults	X				X	X	X	X	X			X		X	X	X	X	X					
Professional Development Consultant for the Kolb Learning Style	X	X			X	X	X		X			X	X	X	X	X	X	X					
Professional Development Consultant for the Perry Scheme	X				X	X	X		X				X	X	X	X		X					X
Professional Development Consultant for the Evaluation of Learning	X				X	X	X	X						X	X	X	X	X					
Progress Monitoring System			X	X											X						X		
Community Resources Component: Educational Planning and Resource Center	X	X		X			X	X			X				X				X	X			
Reading Level Analysis of Instructional Materials	X						X					X			X					X			
Orientation Program	X	X					X	X							X	X	X	X					

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SECTION II

Resource People

Directory

Walter W. Adams, Director

Lifelong Learning Program
Appalachia Educational Laboratory
P. O. Box 1348
Charleston, West Virginia 25325
304/347-0451

Walter W. Adams joined the Appalachia Educational Laboratory (AEL) in 1976 as Associate Director of the Division of Career Guidance and has served as the Project Director for the Lifelong Learning Program since 1981. His professional competencies are in the areas of educational research and development, learning, instructional design, student development, curriculum development, staff development, program management and management systems. His prior experiences include 16 years of managing and conducting educational R & D with adults and postsecondary students. In his present position, he serves as Project Director of the AEL Lifelong Learning Program. As project manager, his responsibilities involve managing studies on the adult educational development. Work to data has focused on the study of adults in making the commitment to return to school and in managing learning during their first term as students. This work has resulted in the research and development of the 15 interventions for Educational Development Task 1, "Adults Making the Commitment to Return to School" and the five intervention designs for Educational Development Task 2, "Adults Managing Learning."

General Consultant for: Long Range Institutional Planning on Adult Learning

Task #1 Intervention(s):
- Validation of Placement Tests
- Toll-Free Telephone Access Number
- Information Booth
- Reading Level Analysis of Admissions Documents
- Educational Planning Resource Center
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Staff Training Package: Educational Planning Resource Center
- Slide/Tape Program: Application Process
- Slide/Tape Program: Academic Advising Process
- Slide/Tape Program: Registration Process
- Educational Planning Course

Task #2 Intervention(s):
- Professional Development--Consultant for the:
  - Intervention Process
  - Educational Development of Adults
  - Kolb Learning Style
  - Perry Scheme
  - Evaluation of Learning
- Community Resources Component: Educational Planning Resource Center
- Reading Level Analysis of Instructional Materials
- Orientation Program

Dan G. Bailey, Counselor and Professor

Ashland Community College
1400 College Drive
Ashland, Kentucky 41101
606/329-2999

Dan G. Bailey is a Counselor and Professor at Ashland Community College. He has worked with the AEL Project staff on the Lifelong Learning Program at Ashland Community College for the past four years. His activities with the project include his attending an AEL Workshop at Southwest Virginia Community College in 1983, teaching the Educational Planning Course to 13 participants for a total of 20 hours in 1984, and serving on the Progress Monitoring System Committee. He has also worked with the AEL staff in developing a slide presentation on Admissions, Academic Advising, and Registration which is being used in the orientation program at the college.

Task #1 Intervention(s): Educational Planning Course

Sandra Barker, Assistant Professor of Counseling

Division of Behavioral Studies & Humanities
West Virginia College of Graduate Studies
Institute, West Virginia 25112
304/768-9711, Ext. 272

Prior to joining West Virginia College of Graduate Studies, Sandra Barker was a Senior Research and Development Specialist in the Lifelong Learning Program at the Appalachia Educational Laboratory (AEL). She was heavily involved in all aspects of the research for Educational Development Task #1, "Adults Making a Commitment to Return to School," from site selection to data analysis and interpretations. She also had primary responsibility for writing the technical report on Educational Development Task #1 research and developing the Staff Training Package on Research Findings. Barker assisted in the development of several interventions and has made workshop presentations on these interventions at the request of AEL. At West Virginia College of Graduate Studies, she teaches graduate classes in counseling and psychology and has conducted workshops for support staff on increasing empathy and understanding of adult students.

Task #1 Intervention(s):
- Guidelines for the Validation and Interpretation of Tests Used in Academic Advising and Placement of Adult Learners
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Staff Training Package: Admissions Office and Support Staff

Lysbeth A. Barnett, Assistant Professor & Coordinator of Business Technology

Ashland Community College
Ashland, Kentucky 41101
606/329-2999

Lysbeth Barnett is an Assistant Professor and Coordinator of Business Technology at Ashland Community College, one of the research sites for the Lifelong Learning Program. With an MBA specialization in management-organizational behavior, she teaches classes in management, personnel and supervision and has conducted a variety of management development seminars and workshops. She participated in the research and selection of interventions for Educational Development Task #2, "Adults Managing Learning." In addition to being a member of the project's advisory committee, she assisted in conducting a pilot study in utilizing the Educational Planning Resource Center (EPRC) materials as a component of one of her courses. She is experienced in using EPRC materials with individual advisees and with large groups in a classroom setting. As a consultant to the project, Barnett prepared the intervention design for the Community Resources Component of the EPRC. She is also chairing an intervention management team to implement this intervention at Ashland. As a teaching faculty member, she is particularly aware of the need to design this component so that it will become a helpful resource for both faculty and students.

Task #1 Intervention(s):
- Educational Planning Resource Center
- Staff Training Package: Educational Planning Resource Center
- Educational Planning Course

Task #2 Intervention(s):
- Professional Development--Consultant for the: Kolb Learning Style
- Community Resources Component: Educational Planning Resource Center
- Orientation Program

Picture Not Available

Ronnie Bartley, Instructor

Business Division
Southwest Virginia Community College
Richlands, Virginia 24541-1510
703/964-2555

Task #2 Intervention(s): Progress Monitoring System

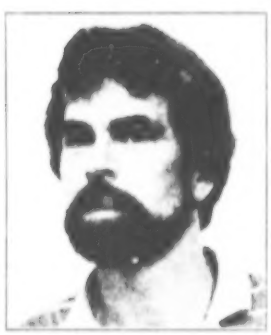
Patricia Beavers, Consultant

510 Hotel Avenue
Tazewell, Virginia 24651
703/988-7626

Patricia Beavers has served as a consultant for the Lifelong Learning Program and assisted in the development of the Progress Monitoring System design for Educational Development Task #2, "Adults Managing Learning." Her background is in Data Processing. She holds an A.A.S Degree with a major in Data Processing from Southwest Virginia Community College. She is currently enrolled at Radford University completing her B.S. Degree in Business Education. She has participated in a Leadership Development Series at Radford and is currently a member of the Institute of Electrical and Electronics Engineers.

Task #1 Intervention(s):
- Admissions Management Information Tracking System (ADMITS)
- Toll-Free Telephone Access Number
- Reading Level Analysis of Admissions Documents

Task #2 Intervention(s):
- Progress Monitoring System
- Community Resources Component: Educational Planning Resource Center



Michael P. Bobolia, College Counselor

Northern Virginia Community College, Woodbridge Campus
15200 Neabsco Mills Road
Woodbridge, Virginia 22191
703/670-2191, Ext. 218

Michael Bobolia is currently a counselor with Northern Virginia Community College and has an educational background in the fields of counseling, family therapy, and human resources development/adult career development. He has been in the field of education for ten years; five of those were spent in Adult Education in the New York Public Schools as a teacher, counselor, and administrator. Responsibilities during that time included adult program development in academic, career development, and employability skills areas. He has had extensive experience counseling adults, including career development counseling, both in and out of educational settings.

Task #1 Intervention(s):
- Educational Planning Resource Center
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Staff Training Package: Educational Planning Resource Center
- Staff Training Package: Admissions Office and Support Staff

Pamela A. Braden, Director

Jackson County Center & Assistant Professor of Business
Parkersburg Community College
111 College Drive
Ripley, West Virginia 25271
304/372-6992

Pamela Braden's background is in Business Education with seven years teaching experience in the Secretarial Science Program. She is an Assistant Professor of Business and Director of the Jackson County Center, Parkersburg Community College (PCC). Braden has conducted staff development programs at PCC for secretaries and regularly conducts workshops/seminars on topics such as personal development, word and information processing, personal power, communication, and conflict management.

Task #1 Intervention(s): Staff Training Package: Admissions Office and Support Staff

Arthur W. Chickering, Director

Center for the Study of Higher Education
406 Ball Education Building
Memphis State University
Memphis, Tennessee 38152
801/454-2775

Arthur Chickering is Distinguished Professor of Higher Education and Director of the Center for the Study of Higher Education at Memphis State University. Chickering began his career in higher education as a psychology teacher and coordinator of evaluation for the experiment in college curriculum organization at Goddard College from 1959-1965, after working as a secondary school teacher and chairman of the Department of Education at Monmouth College. Chickering then directed the "Project on Student Development in Small Colleges," a four-year study of college influences on student development in 13 diverse private colleges. During 1970-71, he was a visiting scholar at the Office of Research at the American Council on Education. From 1971-1977, he played a major role in creating Empire State College as vice president for academic affairs. Chickering is the recipient of the Outstanding Service Award from the National Association of Student Personnel Administrators, a Distinguished Service Citation from the Sex Information and Education Council of the United States, and the Distinguished Contribution to Knowledge Award of the American College Personnel Association. He has been Chairman of the Board of the American Association for Higher Education and the Council for the

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Advancement of Experiential Learning, and a member of the Board of Scholars of the Higher Education Research Institute, the Editorial Board of the Journal of Higher Education, and the Panel of Advice of the Institute for Higher Education, University of New England, Australia.

General Consultant for: Long Range Institutional Planning on Adult Learning

Task #1 Intervention(s):
- Guidelines for the Validation and Interpretation Tests Used in Academic Advising and Placement of Adult Learners
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Educational Planning Course

Task #2 Intervention(s): Professional Development--Consultant for the:
- Intervention Process
- Educational Development of Adults
- Kolb Learning Style
- Perry Scheme
- Evaluation of Learning

James Cox, Director

Telecommunications & Educational Services
Southern West Virginia Community College
Logan, West Virginia 25601
304/752-5900

James Cox is the Director of Institutional Research and Grants. Cox has a background in Administration of Higher Education and served as the Academic Dean at California Christian College in Fresno, California. Cox has been affiliated with the Appalachia Educational Laboratory since 1984 representing Southern West Virginia Community College, and LLP Consortium school. Cox also served as a resource person during the LLP Kentucky State Dissemination Conference.

General Consultant for: Long Range Institutional Planning on Adult Learning

Task #1 Intervention(s):
- Validation of Placement Tests
- Toll-Free Telephone Access Number
- Information Booth
- Reading Level Analysis of Admissions Documents
- Educational Planning Resource Center
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Staff Training Package: Educational Planning Resource Center

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Slide/Tape Program: Application Process
Slide/Tape Program: Academic Advising Process
Slide/Tape Program: Registration Process
Educational Planning Course

Task #2 Intervention(s): Professional Development--Consultant for the:
Intervention Process
Educational Development of Adults
Kolb Learning Style
Perry Scheme
Evaluation of Learning
Community Resources Component: Educational Planning Resource Center
Reading Level Analysis of Instructional Materials
Orientation Program

Charles S. Claxton, Associate Professor

Department of Curriculum and Instruction and Center for the Study of Higher Education
Center for the Study of Higher Education
Memphis State University
Memphis, Tennessee 38152
901/454-2775

Charles S. Claxton is Associate Professor in the Center for the Study of Higher Education and the Department of Curriculum and Instruction at Memphis State University. His major areas of interest include effective college teaching, adult learning, theory and research on experiential learning and adult development, outcomes assessment, planning for professional development, and using developmental theory to improve administrative practices. He holds a Ph.D. from the Department of Higher Education at Florida State University, a Master's degree in Counseling and Guidance from West Georgia College, and a bachelor's degree in Political Science from the University of North Carolina-Chapel Hill. He previously worked as Assistant Dean for Counseling Services at Meridian Junior College in Meridian, Mississippi, and as Staff Associate with the Southern Regional Education Board.

Task #1 Intervention(s): Staff Training Package: Research Findings
Staff Training Package: Academic Advising and Counseling Staff
Staff Training Package: Adult Commitment

Task #2 Intervention(s): Professional Development--Consultant for the:
Intervention Process
Educational Development of Adults
Kolb Learning Style
Perry Scheme
Evaluation of Learning

Picture Not Available

Robert Goodpaster, Director

Ashland Community College
1400 College Drive
Ashland, Kentucky 41101
606/329-2999

Task #2 Intervention(s):
- Professional Development--Consultant for the:
  - Intervention Process
  - Educational Development of Adults
  - Evaluation of Learning
- Community Resources Component: Educational Planning Resource Center

Virginia N. Gordon, Coordinator

Academic & Career Advising
University College
Ohio State University
2924 Wellesley Drive
Columbus, Ohio 43221
614/422-0646

Virginia Gordon is Coordinator for Academic and Career Advising in University College, The Ohio State University. She has many years of practical experience in all aspects of education and career planning and program development. Gordon is an Assistant Professor in the College of Education and teaches graduate level courses in career development theory and counseling, academic advising, and adult development. She is nationally known as a consultant in the areas of academic and career advising, especially in working with undecided students. She is the author of "The Undecided College Student." Gordon has served as a Lifelong Learning Program (LLP) consultant on the development of the Staff Training Package: Academic Advising and Counseling Staff intervention and has conducted two training sessions for faculty at Ashland Community College a research site for the LLP.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Educational Planning Resource Center
- Educational Planning Course

Task #2 Intervention(s):
- Professional Development--Consultant for the:
  - Educational Development of Adults
  - Kolb Learning Style
  - Perry Scheme

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Jane Gray, Training Specialist

Summer Youth Employment Program
601 Allison Avenue, SW
Roanoke, Virginia 24016
703/345-9386

Jane Gray's background is in the field of Education. She acquired her Masters as part of the Internship Masters Program at the Appalachia Educational Laboratory (AEL) June 1978-June 1979. During this time, Gray assisted with the development of the Adult Career Decision-Making Program and later implemented the program at the Fifth District Employment and Training Consortium (CETA) in Roanoke, Virginia. Gray has served as a consultant for AEL during the research phase on Educational Development Task #1, "Adults Making the Commitment to Return to School." She is presently working as a training specialist for a Summer Youth Employment Program, TAP, in Roanoke.

Task #1 Intervention(s): Educational Planning Resource Center
Educational Planning Course

Task #2 Intervention(s): Community Resources Component: Educational Planning Resource Center

Picture Not Available

Stephen F. Hamilton, Associate Professor

Department of Human Development and Family Studies
MVR Hall
Cornell University
Ithaca, New York 14853
607/255-2535

Hamilton has served as a consultant to the AEL Lifelong Learning Program on research design, data analysis, and interpretation of findings; trainer of data collectors and participant in dissemination conferences. He is knowledgeable about qualitative research, applied research, human development and learning, education in formal and informal settings (i.e., classroom and experiential learning), staff development, group process and planning.

General Consultant for: Long Range Institutional Planning on Adult Learning

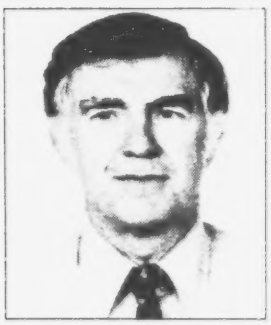
Bobby Kenneth Horton, Director/Counselor

Career Resource Center
Wytheville Community College
1000 East Main
Wytheville, Virginia 24382
703/228-5541

Bobby Horton has been involved in Career Education since 1973. He has worked in and directed a Title III, Nationally Validated Career Education Project for five years. He has twelve years experience in public schools as a teacher and counselor, three years experience as a community college counselor working in career education and placement. He has conducted local, state, and national workshops to disseminate Career Education project methods and results. Horton has worked closely with AEL to establish a comprehensive Career Center at Wytheville Community College.

Task #1 Intervention(s):
- Educational Planning Resource Center
- Staff Training Package: Educational Planning Resource Center
- Educational Planning Course

Task #2 Intervention(s):
- Community Resources Component: Educational Planning Resource Center



George W. Johnson, Associate Professor

Department of Human Development and Learning
P. O. Box 18940A
East Tennessee State University
Johnson City Tennessee 37614
615/929-4440

George Johnson teaches in the Department of Human Development and Learning, which is located in the College of Education at East Tennessee State University (ETSU) in Johnson City, Tennessee. His responsibilities include teaching several of the courses for preparing graduate students for work as counselors in schools, community agencies, government service, and business and industry. Two courses which especially relate to lifelong learning are the freshman course in Career Planning and the graduate course entitled "Career Planning Systems." Johnson has taught both of these courses several years and uses the Appalachia Educational Laboratory's (AEL) Career Planning and Decision-Making (CPDM) text (college version) in both courses. He has conducted several one day seminars on the CDPM materials for McKnight Publishing Company. He has conducted workshops in Career Planning and Computerized Career Guidance during the summer sessions at ETSU. He has also attended several workshops conducted by AEL as well as professional conferences on career planning.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Staff Training Package: Educational Planning Resource Center
- Educational Planning Course

Kay D. Kincer, Assistant Director

Instructional Services
Wytheville Community College
1000 East Main Street
Wytheville, Virginia 24382
703/228-5541, Ext. 210

Kay Kincer's background is in Elementary Supervision and Administration in the fields of special education and psychology. Her duties at Wytheville Community College include coordinating professional development activities as well as advising the Dean of Instruction with special projects and activities. She is working directly with the school divisions in coordinating articulation plans and she oversees the operation of the regional sites. In addition, Kincer has conducted workshops and inservice training for public schools and community college which include: effective leadership training, stress management, curriculum and instruction, speech and language development, counseling parents of handicapped children and effective communication.

Task #1 Intervention(s):
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Staff Training Package: Admissions Office and Support Staff

Task #2 Intervention(s):
- Professional Development--Consultant for the:
  - Intervention Process
  - Educational Development of Adults
  - Kolb Learning Style
- Reading Level Analysis of Instructional Materials

Ann Q. Lynch, Associate Professor

Counseling & Personnel Services
Center for the Study of Higher Education
Memphis State University
Memphis, Tennessee 38152
901/454-2775

Ann Lynch's interest and work with adult learning is based on having been Executive Director of the Higher Education for Adult Mental Health Project, sponsored by NIMH, in the Center at Memphis State. Recognizing the motivation of adults and the barriers confronting them as they make the commitment to enter or return to college has helped her in working with colleges and universities in developing model programs to serve adults more effectively. After 15 years of counseling and preventive mental health work at the University of Florida, she learned that adults have special strengths and concerns to which institutions can respond. She also coordinates the Center Associates Network and teaches courses in counseling.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling
- Staff Training Package: Adult Commitment

Jan L. Morris, Counselor and Institutional Coordinator for Lifelong Learning Program (LLP)

Parkersburg Community College
Box 167-A Rt. 5
Parkersburg, West Virginia 26101
304/424-8211

Jan Morris' background is in psychology and counseling. She has been counselor at Parkersburg Community College (PCC) since 1977. Her duties included diversified personal, career, and academic counseling; she develops and presents workshop and classroom presentations; provides inservice training for staff, faculty, and academic advisers; conducts and interprets interests, personality, and placement tests; and is also involved in crisis intervention counseling. She serves as the LLP Coordinator for PCC.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Staff Training Package: Admissions Office and Support Staff

Task #2 Intervention(s):
- Professional Development--Consultant for the:
  - Kolb Learning Style
  - Perry Scheme

Patricia H. Murrell, Professor

Department of Counseling and Personnel Services and
Center for the Study of Higher Education
Memphis State University
Memphis, Tennessee 38152
901/454-2772

Pat Murrell teaches in the Department of Counseling and Personnel Services and serves in the Center for the Study of Higher Education at Memphis State University. She has taught and advised graduate students in higher education, has served as an administrator at Memphis State and has worked on to major multi-institutional projects on adult learners. She has conducted workshops on developmental theory, experiential learning theory and learning styles, life cycle theory, as well as academic advising, faculty tenure and promotion, and applications of human development theory in the work place. She is currently involved in research on outcomes assessment based on developmental theory and learning styles.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment

Task #2 Intervention(s):
- Professional Development--Consultant for the:
  - Intervention Process
  - Educational Development of Adults
  - Kolb Learning Style
  - Perry Scheme
  - Evaluation of Learning

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Cheryl L. Myers, Counselor

Student Services Department
Parkersburg Community College-Jackson County Center
111 College Drive
Ripley, West Virginia 25271
304/372-6992

Cheryl Myers' background is in psychology, counseling, and human resources. In her present position at Parkersburg Community College (PCC) she represents all facets of student services on a satellite campus serving approximately 460 students (67% of whom are adult learners, i.e. 25 plus years old). The majority of her work is involved in the counseling, financial aid, and academic advising areas. They have online registration and therefore perform the registrar's and business office functions locally. In addition, she is involved in career planning in her counseling as well as through the Career Planning and Personal Decision-Making and College Orientation courses (for college credit). All local students activities functions and groups are coordinated through this office including a student staffed used book exchange program. Before entering the field of higher education, Myers counseled in the mental health and psychiatric fields.

Task #1 Intervention(s):

- Educational Planning Course
- Information Booth
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment
- Staff Training Package: Admission Office and Support Staff

Task #2 Intervention(s):

- Professional Development--Consultant for the:
  - Intervention Process
  - Educational Development of Adults
  - Kolb Learning Style
  - Perry Scheme
  - Evaluation of Learning
- Progress Monitoring System
- Community Resources Component: Educational Planning Resource Center
- Reading Level Analysis of Instructional Materials
- Orientation Program

Armand M. Opitz, Dean

Student Development Services
Southwest Virginia Community College
Box SVCC
Richlands, Virginia 24641
703/964-2555

Armand Opitz's professional background includes twenty-one years of student development leadership experience in community colleges, including the opening development of two, one in North Carolina, South Carolina, Georgia, Kentucky, Florida, and Texas. He has been active as a consultant in public school testing programs, CEEB advising group for C.G.P.P. development, and the private sector in banking and county/area governments/agencies in economic development. His teaching background includes public school, community college and graduate courses. Opitz was instrumental in the revision of the SVCC Student Handbook based upon the LLP Reading Analysis for Admission Documents intervention. He also assisted or supervised staff members who worked with other interventions. He developed a Task #2 intervention "Orientation Program" and has served as a resource person during two of the LLP state dissemination conferences.

Task #1 Intervention(s):
- Toll-Free Telephone Access Number
- Reading Level Analysis of Admissions Documents
- The Admissions Process: Audiovisual Information Development Guide
- Staff Training Package: Academic Advising and Counseling Staff

Task #2 Intervention(s):
- Orientation Program

Bonnie L. Prince, Dean

Alternative Education
Hocking Technical College
Nelsonville, Ohio 45764
614/753-3591

Bonnie Prince has designed and implemented a variety of "alternative" credit programs, tailored to the needs of nontraditional, usually adult, students. Included are the Hocking Management Institute offering professional development and degrees, human resource development seminars, and an Entrepreneurship Center for managers; credit for prior learning through portfolio development; use of telecourses and teleconferences; programs for disadvantaged, handicapped and unemployed adults; internships for international educators; and an open entry, self-paced, competency based learning program. Supporting these she has

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designed complementary professional development projects to assist staff moving into nontraditional teaching and advising roles. She has coordinated staff-training seminars, the education workshop at the 1985 conference, "Appalachia, Ohio: 20 Years Later," and the entire 1983 Mid-American Conference on Individualized Instruction (240 participants). She has served on advisory councils on telecommunications in higher education to the Ohio Board of Regents, regional public broadcasting, and the Ohio Post-Secondary Telecommunications Council. She has co-implemented call-in television programs on adult learning options in southeast Ohio. Prince has been a consultant and workshop presenter on adult reentry during 1985-86 for the UAW/Ford project sponsored by the Council for Adult and Experiential Learning (CAEL), and a presenter at the 1986 CAEL National Institute on Telecommunication in Higher Education. She has been President and serves on the Board of the Midwest Association for Individualized Instruction. She is currently completing a Ph.D. in Organizational Communication at Ohio University focusing on interpersonal communication, adult development, and the integration of the individual in the organization.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment

Task #2 Intervention(s):
- Professional Development--Consultant for the:
  - Intervention Process
  - Educational Development of Adults
  - Kolb Learning Style
  - Perry Scheme
  - Evaluation of Learning
- Orientation Program

Mary L. Richmond, Director

Whole Life Training Resources
1420 Kanawha Boulevard, East
Charleston, West Virginia 25301
304/343-3918

Mary Richmond has developed and given training programs in human potential, holistic health, wellness, and health promotion since 1981. She is presently a consultant in developing training materials (workshops, manuals, audiovisuals) for the St. Francis Hospital Fifty-Five Plus Wellness Program, Charleston, West Virginia. She also gives wellness workshops to organizations and government agencies, topics varying in stress management and wellness motivation. She organized the Natural Health Education Program, University of Charleston, and serves as consultant/coordinator for the program. Richmond helped edit materials for Tasks #1 and #2, AEL's Lifelong Learning Program, and developed the training package for Admissions Office and Support Staff. She has conducted training sessions using this intervention at both LLP research sites. In addition, she has participated in LLP Intervention Planning Workshops.

Task #1 Intervention(s):
- Staff Training Package: Admission Office and Support Staff

Norma M. K. Roberts, Consultant

Adult Education/Staff Development
Ohio Department of Education
65 Front Street, Room 811
Columbus, Ohio 43215
614/446-4186

Norma Roberts' goals and involvement as a lifelong learner provided a solid basis for her professional commitment to enhance and expand educational opportunities for adults. Experience as a traditional and nontraditional adult learner, combined with an extensive background in counseling and behavioral studies, was the beginning of a new career focus, adult education. An important part of her doctoral program in adult education at the University of Wisconsin-Madison, was her research dissertation, "The Human Developmental Needs of Adults Across the Lifespan with Implications for Higher Education." She has conducted further research centered on the comparative learning preference styles of adults. Findings from those studies are included in the document which she authored, Adult Learner Characteristics and Learning Styles. Roberts has served as a resource consultant for the Appalachia Educational Laboratory Lifelong Learning Program and made numerous presentations to state and national professional organizations, including the American Association for Adult and Continuing Education. Current involvement with lifelong learning in her present position with the Ohio Department of Education includes providing expertise and leadership for a strong focus on recruitment and retention of adult students. Data collection, analysis of needs, development of effective programs and training staff in methods for strengthening those areas is a vital part of the program for which she has responsibility.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Educational Planning Resource Center
- Staff Training Package: Admission Office and Support Staff

Task #2 Intervention(s):
- Professional Development--Consultant for the:
  - Intervention Process
  - Educational Development of Adults
  - Kolb Learning Style
  - Perry Scheme
  - Evaluation of Learning
- Orientation Program

Eugene W. Schoch, Assistant Professor

Psychology/Sociology
Mountain Empire Community College
Big Stone Gap, Virginia 24219
703/523-2400

Eugene Schoch has been interested in the education of special populations all of his career. Attending college in Appalachia inspired him to use his talents to help others. He has been a Dean, Professor, and administrator in community, private, state colleges, and universities. He has directed graduate programs in college personnel services and has served as a consultant to over thirty colleges. He was the first statewide consultant to community college student services programs in Florida. He has published research in counselor education and several areas of student services. He has been a leader in professional organizations at the state, regional and national level. He has also worked outside of education in industrial and personnel management, sales, travel and as vice-president of a management consulting firm. He enjoys the classroom functioning as a counselor, and being a consultant.

Task #1 Intervention(s):

- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Educational Planning Resource Center
- Staff Training Package: Admission Office and Support Staff
- Educational Planning Resource Center

Task #2 Intervention(s):

- Professional Development--Consultant for the:
  - Intervention Process
  - Educational Development of Adults
  - Kolb Learning Style
  - Perry Scheme
  - Evaluation of Learning
- Orientation Program

Eileen Sheahan, Career and Life Planning Specialist/Student Retention Project Coordinator for Title III, HEA

Roane State Community College
Patton Lane
Harriman, Tennessee 37748
615/354-3000, Ext. 246

Eileen Sheahan serves as a Career and Life Planning Specialist and Student Retention Project Coordinator for Title III, HEA, at Roane State Community College. She has developed training programs, ranging from Upward Bound youth, seniors-teaching-seniors peer groups, and nontraditional learning formats for professional development. She is experienced in presenting research findings and workshops on a variety of subjects--particularly career planning and job-search techniques. She received training from Richard Bolles, author of What Color Is Your Parachute? Sheahan has worked with adult learners through public libraries of Oak Ridge, Tennesseee and Memphis, Tennessee.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment

Task #2 Intervention(s):
- Community Resources Component: Educational Planning and Resource Center

Phyllis Stowers, Writer

Division of Career Guidance
Appalachia Educational Laboratory
P. O. Box 1348
Charleston, West Virginia 25325
304/347-0454

Phyllis Stowers joined AEL in 1966. She worked on the development, field test, and revision of the Career Decision-Making (CDM) Program for secondary school students. In addition to writing and editing, duties have also included inservice work with field test site personnel, review of Career Information System evaluation data, and has assisted in the planning and preparation of various workshops and inservice training sessions.For the past four years, Stowers has been involved in the Lifelong Learning Program research study on adults returning to community colleges. She has assisted in data collection through classroom observations and interviews with adults and faculty. When the research phase was completed, Stowers had the responsibility for developing

Continued on next page

several interventions, writing and editing validation reports, as well as responsibility for the final editing of all 15 interventions. She has also made presentations on LLP interventions at state dissemination conferences.

Task #1 Intervention(s):
- Toll-Free Telephone Access number
- Information Booth
- Reading Level Analysis of Admissions Documents
- Educational Planning Resource Center
- Staff Training Package: Educational Planning Resource Center
- Staff Training Package: Admissions Office and Support Staff
- Educational Planning Course

Task #2 Intervention(s):
- Community Resources Component: Educational Planning Resource Center
- Reading Level Analysis of Instructional Materials

C. Todd Strohmenger, Technology Consultant

Appalachia Educational Laboratory
P. O. Box 1348
Charleston, West Virginia 25325
304/347-0426

Todd Strohmenger joined the Appalachia Educational Laboratory (AEL) in 1972 as a staff member in the Division of Career Guidance. He participated in the development of the Career Decision-Making (CDM) Program and served as technical advisor to the Department of Labor for development of the Guide for Occupational Exploration (GOE) during his ten years with the Division. Also during this time period he made numerous presentations on the CDM Program and served as a CDM resource person for McKnight Publishing Company. For the past four years he has served as a technical consultant at AEL and developed the prototype for the Admissions Management Information Tracking System (ADMITS) Intervention.

Task #1 Intervention(s):
- Admissions Management Information Tracking System

Task #2 Intervention(s):
- Progress Monitoring System

Picture Not Available

Russell E. Thomas, Associate Professor

Center for the Study of Higher Education
Memphis State University
Memphis, Tennessee 38152
901/454-3424

Russell Thomas has taught research and theory on college student development, student personnel services and assessment of individual college services and assessment of individual college students for the past seventeen years. In addition, he has written about academic advising. Thomas has worked with faculty in a variety of institutions, particularly technical institutes. His practical work with students has included work with adult students, both undergraduate and graduate, as advisor and teacher. Topics in which Thomas has experience included: student development, minority students, high risk developmental students, multicultural education, and personalized education.

Task #1 Intervention(s):
- Staff Training Package: Research Findings
- Staff Training Package: Academic Advising and Counseling Staff
- Staff Training Package: Adult Commitment

Task #2 Intervention(s):
- Professional Development--Consultant for the: Perry Scheme

Harold D. VanHook, Dean of Instruction

Southwest Virginia Community College
Richlands, Virginia 24641-1510
703/964-2555

Harold VanHook's background is in administration and he has served as Dean of Instruction at SVCC since 1974. SVCC was one of two research sites for the Lifelong Learning Program research. During this phase, VanHook was a participant and presenter at several conferences. His past experience includes conducting workshops in communication, human relations, stress management, and time management at both the state and national levels. On the average, he conducts ten to fifteen workshops per year. In the past he has worked with high schools students, public school teachers, central office staff in public schools, community college instructors and support staff personnel. He has conducted workshops for approximately 1,000 people this year.

Task #1 Intervention(s):
- Staff Training Package: Admissions Office and Support Staff

David W. Winefordner, Director

Division of Career Guidance
Appalachia Educational Laboratory
P. O. Box 1348
Charleston, West Virginia 25325
304/347-0455

David Winefordner has been with the Appalachia Educational Laboratory for fifteen years as the Director of the Division of Career Guidance. He has vast experience in the development and publication of the AEL Career Decision-Making (CDM) Program for both secondary and college students. He is the major author of a similar program for junior high school students published recently by Bennett-McKnight Publishing Company. In addition, he has presented the CDM Program at national conventions and conducted national and international workshops. He is the main developer of the LLP intervention "Audiovisual Information Development Guide" and has presented this and other interventions at several LLP Dissemination Conferences.

Areas of specialization: Career assessment, career information systems, and career and educational planning

Task #1 Intervention(s):
Staff Training Package: Educational Planning Resource Center
Educational Planning Resource Center
The Admissions Process: Audiovisual Information Development Guide